

HR306

Configuration of Time Recording

EXERCISES AND SOLUTIONS

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

Example text

Window title

Example text

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Unit 1

Exercise 1

Record Time Data Using the Time Manager's Workplace

Business Example

You need to record time data for your employees. For this reason, you need to know how to use the TMW to record time data.

Enter and maintain time data using the TMW and then verify your entries in the infotype maintenance function.



Hint:

Use the personnel number **306993##** of Jane Miller (a salaried employee), where **##** is your group number. When choosing dates for the time entries for this exercise, do not forget to check the validity dates for infotype 2006.

1. Access the *Time Manager's Workplace* and temporarily add your employee Jane Miller to the employee list.
2. Jane Miller has requested three days of leave. Enter a leave record for a period of three days in the previous month. Use the time data ID **L**.
3. Jane has a one-day business trip this month. Use time data ID **BT** to create a one-day business trip.
4. Enter a partial-day absence for a doctor's appointment on Monday of the following week from 1:00 p.m. to 3:00 p.m. Use the time data ID **DOC**.
5. Check the entries that you created for Jane Miller in the monthly view on the *Calendar* tab page.
6. Find out the date of Easter Monday this year.
7. Verify your entries in the infotype maintenance function.

Record Time Data Using the Time Manager's Workplace

Business Example

You need to record time data for your employees. For this reason, you need to know how to use the TMW to record time data.

Enter and maintain time data using the TMW and then verify your entries in the infotype maintenance function.



Hint:

Use the personnel number **306993##** of Jane Miller (a salaried employee), where **##** is your group number. When choosing dates for the time entries for this exercise, do not forget to check the validity dates for infotype 2006.

1. Access the *Time Manager's Workplace* and temporarily add your employee Jane Miller to the employee list.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Manager's Workplace*.
 - b) In the *Choose by Personnel Number* section of the screen, choose the *Employee list* pushbutton.
 - c) Choose *Temporarily insert employees*.
 - d) In the *Temporarily Insert Employees* dialog box, enter **306993##** in the *Personnel No.* field and choose *Confirm*.
2. Jane Miller has requested three days of leave. Enter a leave record for a period of three days in the previous month. Use the time data ID **L**.
 - a) On the *Time Data* tab page, choose the *Create details* pushbutton.
 - b) In the *ID* field of the *Detail* screen area, enter **L**.
 - c) In the *Date* field of the *Detail* screen area, enter an applicable time period of three days.
 - d) Press ENTER to confirm your entries and save.



Note:

Notice that the system closes a leave record and starts a new one each time you press ENTER. If you enter a period that is not within the selected period in the calendar, a warning appears.

3. Jane has a one-day business trip this month. Use time data ID **BT** to create a one-day business trip.
 - a) In the *Calendar* screen area, select the month during which you want to record the one-day business trip.
 - b) Select the day on which you want to record the business trip.
 - c) On the Time Data tab, enter BT in the Time ID field.
 - d) Press ENTER to confirm your entries.
 - e) Save your entries.
4. Enter a partial-day absence for a doctor's appointment on Monday of the following week from 1:00 p.m. to 3:00 p.m. Use the time data ID **DOC**.
 - a) In the *Calendar* screen area, select the Monday of the following week.
 - b) On the Time Data tab, enter DOC in the Time ID field.
 - c) Press ENTER and a line entry opens.
 - d) Enter **13:00** in the first box (*Start time* field) and **15:00** in the second box (*End Time* field).
 - e) Press ENTER to confirm your entries and save.
5. Check the entries that you created for Jane Miller in the monthly view on the *Calendar* tab page.
 - a) Choose the *Calendar* tab page. The data is displayed graphically.
 - b) Look for your leave, business trip, and doctor's appointment entries by selecting the respective months from the calendar.
6. Find out the date of Easter Monday this year.
 - a) Choose the *Month* pushbutton.
 - b) Select the relevant month in the calendar.
 - c) Check for the Easter holiday (public holiday).
 - d) Go back to the SAP Easy Access screen.
7. Verify your entries in the infotype maintenance function.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.
 - b) On the *Maintain Time Data* screen, in the *Personnel no.* field, enter **306993##** as Jane Miller's personnel number and press ENTER.
 - c) Choose the *Absences* infotype to check the leave and doctor's appointment entries you created.
 - d) In the *Period* screen area, choose the *All* radio button.
 - e) Choose the *Overview* pushbutton to display your entries.
 - f) Go back to the *Maintain Time Data* screen. Choose the *Attendances* infotype to check the business trip entry you created.

- g) Choose the *All* radio button.
- h) Choose the *Overview* pushbutton to display your entries.
- i) Choose *Back* twice to the SAP Easy Access screen.

Unit 1 Exercise 2

Record Time Data Using Infotypes

Business Example

You need to record time data of your employees. For this reason, you must know how to use infotypes to record time data.

Enter and maintain time data using infotypes and then verify your entries in the infotype maintenance function.



Hint:

Use the personnel number **306993##** of Jane Miller (a salaried employee) where **##** is your group number. When choosing dates for the time entries for this exercise, do not forget to check the validity dates for infotype 2006.

1. Access infotype maintenance.
2. Enter a three-day leave record using the *Absences* infotype (**2001**), subtype **0100**.
3. On the next working day after you recorded the 3 days of leave, enter a one-day business trip using the *Attendances* infotype (**2002**), subtype **0400**.
4. Enter a partial-day doctor's appointment from 1:00 p.m. to 3:00 p.m. using the *Absences* infotype (**2001**), subtype **0230**. Choose a day in the following week.

Record Time Data Using Infotypes

Business Example

You need to record time data of your employees. For this reason, you must know how to use infotypes to record time data.

Enter and maintain time data using infotypes and then verify your entries in the infotype maintenance function.



Hint:

Use the personnel number **306993##** of Jane Miller (a salaried employee) where **##** is your group number. When choosing dates for the time entries for this exercise, do not forget to check the validity dates for infotype 2006.

1. Access infotype maintenance.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.
 - b) On the *Maintain Time Data* screen, in the *Personnel no.* field, enter **306993##** as Jane Miller's personnel number. Choose *Enter* to confirm your entry.
2. Enter a three-day leave record using the *Absences* infotype (**2001**), subtype **0100**.
 - a) In the *Period* screen area of the *Maintain Time Data* screen, select the *Period* radio button.
 - b) In the *From* field, enter the start date of the leave. Use a date 2 weeks in the future
 - c) In the *To* field, enter the date up to which leave is required.
 - d) In the *Direct selection* screen area, enter the following data:

| Field | Value |
|-----------------|-------------|
| <i>Infotype</i> | 2001 |
| <i>STy</i> | 0100 |
3. On the next working day after you recorded the 3 days of leave, enter a one-day business trip using the *Attendances* infotype (**2002**), subtype **0400**.
 - a) On the *Working times* tab page, choose the *Attendances* infotype.
 - b) In the *Period* screen area, enter the date of the business trip in the *From* and *To* fields.

- c) In the *Direct selection* screen area, enter the following data:

| Field | Value |
|----------|-------|
| Infotype | 2002 |
| STy | 0400 |

- d) On the menu bar, choose *Edit* → *Create*.

- e) Save your entries.

4. Enter a partial-day doctor's appointment from 1:00 p.m. to 3:00 p.m. using the *Absences* infotype (2001), subtype 0230. Choose a day in the following week.

- a) On the *Working times* tab page, choose the *Absences* infotype.

- b) In the *Direct selection* screen area, enter the following data:

| Field | Value |
|----------|-------|
| Infotype | 2001 |
| STy | 0230 |

- c) On the menu bar, choose *Edit* → *Create*.

- d) In the *Start* and *To* fields, enter the date of the doctor's appointment.

- e) In the *Time* field, enter the time of the doctor's appointment, **13:00-15:00**.

- f) Save your entries.

- g) Return to the SAP Easy Access screen.

Unit 2

Exercise 3

Perform an Organizational Reassignment

Business Example

As a result of employee transfers, you need to complete an organizational reassignment to move them into another personnel subarea.

Starting January 1 of the current year, assign the following employees to personnel subarea **TP##**:

Tom Johnson (personnel number: **306991##**): Hourly-wage earner

Karen Anderson (personnel number: **306992##**): Salaried employee

(## = your group number)

Assign the personnel subarea **TP##**.

1. Execute the *Organizational Reassignment* personnel action for your employees Karin Anderson and Tom Johnson, effective from January 1 of the current year. Assign the personnel subarea **TP##**.
2. Execute the Organizational Reassignment personnel action for Karen Anderson (personnel number 306992##).

Unit 2 Solution 3

Perform an Organizational Reassignment

Business Example

As a result of employee transfers, you need to complete an organizational reassignment to move them into another personnel subarea.

Starting January 1 of the current year, assign the following employees to personnel subarea **TP##**:

Tom Johnson (personnel number: **306991##**): Hourly-wage earner

Karen Anderson (personnel number: **306992##**): Salaried employee

(## = your group number)

Assign the personnel subarea **TP##**.

1. Execute the *Organizational Reassignment* personnel action for your employees Karin Anderson and Tom Johnson, effective from January 1 of the current year. Assign the personnel subarea **TP##**.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.
 - b) Enter the following data in the respective fields:

| Field | Input |
|---------------|---------------------------|
| Personnel no. | 306991## |
| From | 01.01 of the current year |
 - c) Select the action type *Organizational Reassignment*.
 - d) Choose the *Execute* pushbutton.
 - e) The Actions infotype (0000) is displayed. Choose the *Save* pushbutton.
 - f) Choose *Enter* to confirm the system warning that appears. The *Copy Organizational Assignment* screen is displayed.
 - g) In the *Subarea* field in the *Enterprise structure* screen area, enter **TP##**.
 - h) Save your entries and choose *Enter* to confirm the system warning that appears. Return to the *Personnel Actions* screen by choosing the *Next record* pushbutton twice to skip the subsequent infotypes.
 - i) Repeat steps (b) to (h) to execute the *Organizational Reassignment* personnel action for Karen Anderson (personnel number: **306992##**).
2. Execute the Organizational Reassignment personnel action for Karen Anderson (personnel number 306992##).

- a) Enter the following data in the respective fields:

| Field | Input |
|---------------|---------------------------|
| Personnel no. | 306992## |
| From | 01.01 of the current year |

- b) Select the action type *Organizational Reassignment*.
- c) Choose the *Execute* pushbutton.
- d) The Actions infotype (0000) is displayed. Choose the *Save* pushbutton.
- e) Choose *Enter* to confirm the system warning that appears. The *Copy Organizational Assignment* screen is displayed.
- f) In the *Subarea* field in the *Enterprise structure* screen area, enter **TP##**.
- g) Save your entries and choose *Enter* to confirm the system warning that appears. Return to the *Personnel Actions* screen by choosing the *Next record* pushbutton twice to skip the subsequent infotypes.

Unit 3 Exercise 4

Create Break Schedules

Business Example

You need to set up and generate work schedules. As part of setting up a work schedule, you need to create break schedules.

Create the break schedule *PA##* and enter three unpaid breaks as follows:



- 12:00 to 13:30: Lunch break
- 15:00 to 15:15: Coffee break
- 22:00 to 22:15: Overtime break

Use the grouping *01* for daily work schedules.

1. Access Customizing.
2. Check the groupings to make sure the grouping for work schedules and daily work schedules for your personnel area *TP##* is *01*.
3. Create the break schedule *PA##*.

Unit 3

Solution 4

Create Break Schedules

Business Example

You need to set up and generate work schedules. As part of setting up a work schedule, you need to create break schedules.

Create the break schedule *PA##* and enter three unpaid breaks as follows:



- 12:00 to 13:30: Lunch break
- 15:00 to 15:15: Coffee break
- 22:00 to 22:15: Overtime break

Use the grouping *01* for daily work schedules.

1. Access Customizing.

- From the SAP Easy Access screen, choose *Tools* → *Customizing* → *IMG* → *Execute Project*. The *Customizing: Execute Project* screen appears.

If there is no project IMG for Time Recording, choose *SAP Reference IMG* or choose the menu path *Goto* → *SAP Reference IMG*. If a project IMG has been created (announced by the instructor), choose *Add to worklist*. In the subsequent *Add project/views to worklist* window, select the relevant project and choose *Copy*. Select the project now in your Customizing worklist and then choose *Display project*. The IMG appears for your project.

2. Check the groupings to make sure the grouping for work schedules and daily work schedules for your personnel area *TP##* is *01*.

- In Customizing, choose *Time Management* → *Work Schedules* → *Personnel Subarea Groupings* → *Group Personnel Subareas for the Work Schedule*.

The grouping for work schedules for your personnel subarea *TP##* must be *01*. If prompted to choose a country, choose the International Country Grouping 99.

- In Customizing, choose *Time Management* → *Work Schedules* → *Personnel Subarea Groupings* → *Group Personnel Subareas for the Daily Work Schedule*.

Confirm that the personnel subarea grouping for daily work schedules for your personnel subarea *TP##* is *01*.

3. Create the break schedule *PA##*.

- In Customizing, choose *Time Management* → *Work Schedules* → *Daily Work Schedules* → *Define Break Schedules*.

- In the subsequent dialog box, double-click the *Determine Break Schedules* activity.

- Copy an existing break schedule or choose *New Entries*.

- Use the grouping (*Grpg*) for daily work schedule 01 and name your break schedule (*Break*) *PA##*. Number the rows of your break schedule (*No*) from 01 to 03.

- e) Enter the values for the three unpaid breaks in the respective rows as shown in the following table:

| Grpg | Break | No | Start | End | Unpaid | Type 1 |
|------|-------|----|-------|-------|--------|--------|
| 01 | PA## | 01 | 12:00 | 13:30 | 1,00 | |
| 01 | PA## | 02 | 15:00 | 15:15 | 0,25 | |
| 01 | PA## | 03 | 22:00 | 22:15 | 0,25 | o |

- f) Save your entries.

Unit 3

Exercise 5

Create a Daily Work Schedule

Business Example

You need to create daily work schedules for your employees. For this reason, you must know how to create daily work schedule variants and daily work schedule variant rules.

Create a daily work schedule **TZ##** with the description **Normal##** (## = your group number), with a planned working time of eight hours. Define daily work schedule variants and daily work schedule variant rules.

1. Define rules for variants. Variant 1 is always valid on days that are defined by public holiday class 2, as well as on Fridays. Create rule **10+##** (for example the rule for group 5 will be 15) by copying and modifying the existing rule 01 .
2. Define the daily work schedule **TZ##**. Copy the F-11 daily work schedule. Choose the grouping for daily work schedules 01. Work starts at 08:00, with a planned working time of eight hours. Assign the **PA##** break schedule you created previously to the daily work schedule. Use the **10+##** daily work schedule rule that you created previously.
3. Define the daily work schedule variant for daily work schedule TZ## as variant 1 with four planned working hours from 08:00 to 12:00.

Unit 3

Solution 5

Create a Daily Work Schedule

Business Example

You need to create daily work schedules for your employees. For this reason, you must know how to create daily work schedule variants and daily work schedule variant rules.

Create a daily work schedule **TZ##** with the description **Normal##** (## = your group number), with a planned working time of eight hours. Define daily work schedule variants and daily work schedule variant rules.

1. Define rules for variants. Variant 1 is always valid on days that are defined by public holiday class 2, as well as on Fridays. Create rule **10+##** (for example the rule for group 5 will be 15) by copying and modifying the existing rule 01.
 - a) In Customizing, choose *Time Management → Work Schedules → Daily Work Schedules → Define Rules for Variants*.
 - b) On the *Change View “Rules to determine variant for monthly WS rule generation”* screen, select both lines for rule 01, choose the *Copy As* pushbutton, and create rule **10+##** with a variant of 1 follows:

| Rule | Number | Holiday class | HolClNextDay | Day | Variant |
|---------|--------|---------------------|---------------------|---------------------|---------|
| | | b 1 2 3 4 5 6 7 8 9 | b 1 2 3 4 5 6 7 8 9 | b 1 2 3 4 5 6 7 | |
| 10 + ## | 01 | . . x | x x x x x x x x x x | x x x x x x x x x x | 1 |
| 10 + ## | 02 | x x . x x x x x x x | x x x x x x x x x x | x . . | 1 |

Figure 1: Define rule for variants

- c) Save your entries.
2. Define the daily work schedule **TZ##**. Copy the *F-11* daily work schedule. Choose the grouping for daily work schedules 01. Work starts at 08:00, with a planned working time of eight hours. Assign the **PA##** break schedule you created previously to the daily work schedule. Use the **10+##** daily work schedule rule that you created previously.
 - a) In Customizing, choose *Time Management → Work Schedules → Daily Work Schedules → Define Daily Work Schedules*.
 - b) On the *Change View “Daily Work Schedule”*: Overview screen, select the *F-11* entry and choose the *Copy As* pushbutton.
 - c) Modify the planned working time as follows:

| Field | Value |
|--|--|
| <i>Daily work schedule</i> | TZ## with the description Normal## |
| <i>DWS grouping</i> | 01 |
| <i>Planned working hours</i> | 8 |
| <i>(Start of) Planned working time</i> | 08:00 |

| Field | Value |
|---------------------|-------|
| DWS selection rule | 10+## |
| Work break schedule | PA## |

- d) Press enter and note that the DWS selection rule will disappear since you are now creating a variant. Save your entries.
3. Define the daily work schedule variant for daily work schedule TZ## as variant 1 with four planned working hours from 08:00 to 12:00.
- In Customizing, choose *Time Management* → *Work Schedules* → *Daily Work Schedules* → *Define Daily Work Schedules*.
 - On the *Change View "Daily Work Schedule"*: Overview screen, select the TZ## entry you created and choose the *Copy As* pushbutton.
 - On the *Change View "Daily Work Schedule"*: *Details of Selected Set* screen, modify the planned working time as follows:

| Field | Value |
|------------------------------------|---------------------|
| Daily work schedule (TZ## variant) | TZ## / 1 / Normal## |
| Planned working hours | 4 |
| (Start of) Planned working time | 08:00 |
| Work break schedule | (Blank) |

- d) Press enter and note that the DWS selection rule will disappear since you are now creating a variant. Then, save your entries.

Unit 3

Exercise 6

Set Up a Period Work Schedule

Business Example

As a Time Administrator, you are responsible for managing employee work schedules. You have received a request for a new period work schedule. You need to copy an existing period work schedule, modify it, and include it in a daily work schedule. For this reason, you need to know how to set up a period work schedule.

Define a period work schedule.

1. Group the daily work schedules **TZ##** and **OFF** into one period work schedule called **PZ##**.
You can copy an existing period work schedule (or create a new one). Choose the grouping for daily work schedules **01**.
2. Define a period work schedule which indicates that employees work from Day 1 to Day 5 according to the **TZ##** daily work schedule and do not work on Day 6 and Day 7 (daily work schedule **OFF**).

Unit 3

Solution 6

Set Up a Period Work Schedule

Business Example

As a Time Administrator, you are responsible for managing employee work schedules. You have received a request for a new period work schedule. You need to copy an existing period work schedule, modify it, and include it in a daily work schedule. For this reason, you need to know how to set up a period work schedule.

Define a period work schedule.

1. Group the daily work schedules **TZ##** and **OFF** into one period work schedule called **PZ##**.

You can copy an existing period work schedule (or create a new one). Choose the grouping for daily work schedules **01**.

- a) In Customizing, choose *Time Management → Work Schedules → Period Work Schedules → Define Period Work Schedules*.
- b) On the *Change View “Period Work Schedule”*: Overview screen, select Grpg 01 PWS NO and choose Copy As.

c) Enter the following values in the respective fields:

| Field | Value |
|-------------------------------------|---|
| Grpg (Daily work schedule grouping) | 01 |
| PWS | PZ## (with a description of your choice) |
| Week number | 001 |

d) Save your entries.

2. Define a period work schedule which indicates that employees work from Day 1 to Day 5 according to the **TZ##** daily work schedule and do not work on Day 6 and Day 7 (daily work schedule **OFF**).

a) On the *Change View “Period Work Schedule”*: Overview screen, choose the period work schedule you created (PZ##).

b) Enter the following values in the respective fields:

| Field | Value |
|-------|-------------|
| 01 | TZ## |
| 02 | TZ## |
| 03 | TZ## |
| 04 | TZ## |
| 05 | TZ## |

| Field | Value |
|-------|------------|
| 06 | OFF |
| 07 | OFF |

c) Save your entries.

Unit 3

Exercise 7

Identify Day Types and Selection Rules

Business Example

You need to check the selection rule for day types for your employees. For this reason, you must know how to review day types and selection rules.

Check the selection rule for day types.

1. Your employees do not have to work on full-day public holidays (public holiday class 1). Work is paid on half day public holidays (public holiday class 2). Check the selection rule O1. This rule will be referenced later in the work schedule rule.

Unit 3

Solution 7

Identify Day Types and Selection Rules

Business Example

You need to check the selection rule for day types for your employees. For this reason, you must know how to review day types and selection rules.

Check the selection rule for day types.

1. Your employees do not have to work on full-day public holidays (public holiday class 1). Work is paid on half day public holidays (public holiday class 2). Check the selection rule 01. This rule will be referenced later in the work schedule rule.
 - a) In Customizing, choose *Time Management → Work Schedules → Day Types → Define Selection Rules*.
 - b) On the *Change View “Definition Rules for Day Types”*: Overview screen, check the selection rule 01. It should appear as in the following table:

| Rule | | Weekday | Saturday | Sunday |
|------|--------------------|------------|------------|------------|
| | With holiday class | b123456789 | b123456789 | b123456789 |
| 01 | Gives day type | 1 1111111 | 1 1111111 | 1 1111111 |



Figure 2: Check selection rule for day types

Unit 3

Exercise 8

Create Work Schedule Rules

Business Example

You need to set up a work schedule rule to ensure employees' average time is reflected correctly in the system. For this reason, you must know how to create work schedule rules to be assigned to employees.

Define work schedule rule **AZ## ##** = your group number).

1. Access Customizing.
2. Check the employee subgroup grouping assigned to your employees.
3. Check the public holiday calendar assigned to your personnel subarea **TP##**. It should be 99.
4. Define a work schedule rule (**01**). Use your period work schedule **PZ##** and name your work schedule rule **AZ##**.

Create Work Schedule Rules

Business Example

You need to set up a work schedule rule to ensure employees' average time is reflected correctly in the system. For this reason, you must know how to create work schedule rules to be assigned to employees.

Define work schedule rule **AZ## ##** = your group number).

1. Access Customizing.
 - a) In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Define Employee Subgroup Groupings*.
2. Check the employee subgroup grouping assigned to your employees.
 - a) On the *Change View "Text for Work Schedule Grouping"*: Overview screen, double-click *Define Employee Subgroup Groupings*.
 - b) Check whether an employee subgroup grouping exists for salaried staff in the *ES grpgr* and *ES grouping for WS* fields.
 - c) Go back to the *Change View "Text for Work Schedule Grouping"*: Overview screen and double-click *Group Employee Subgroups for Work Schedules*.
 - d) Check whether the employee grouping for work schedules is assigned to your employee group (salaried staff). Grouping 2 should be assigned.
3. Check the public holiday calendar assigned to your personnel subarea **TP##**. It should be 99.
 - a) In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Define Groupings for the Public Holiday Calendar*. If prompted to choose a country, choose Other Countries.
 - b) On the *Change View "Assign Personnel Subarea to Public Holiday Calendar"*: Overview screen, search for your entry (with *Personnel subarea TP##*) and check whether a public holiday calendar is assigned to your personnel subarea **TP##**.
(The public holiday calendar assigned to Personnel subarea *TP##* should be 99. If not, change the value to 99 and choose the Save pushbutton.)
4. Define a work schedule rule **(01)**. Use your period work schedule **PZ##** and name your work schedule rule **AZ##**.
 - a) In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Set Work Schedule Rules and Work Schedules*.
 - b) On the *Change View "Work Schedule Rule"*: Overview screen, select the work schedule rule *FLEX* and choose *Edit → Copy As* from the menu.
 - c) On the *Change View Work Schedule Rule: Details of Selected Set* screen, enter the following values in the respective fields:

| Field | Value |
|----------------------|---|
| ES Grouping | 2 Salaried staff (choose) |
| Holiday Calendar ID | 99 |
| PS grouping | 01 |
| Work Schedule Rule | AZ## Enter ## Four hour Friday as the text. |
| Period Work Schedule | PZ## |
| Ref. date for PWS | 01.01.1990 |
| Start point in PWS | 001 |
| Rule for day types | 01 |
| Start | 01.01.1990 |
| End | 12.31.9999 |



Note:

If the work schedule you have copied has an entry in the *Alternative WS rule* field in the *Reduced working hours* area, delete this entry before saving your work schedule rule.

- d) Save your entries.

Unit 3

Exercise 9

Generate Work Schedules

Business Example

You want to generate a work schedule and assign it to your employees. For this reason, you need to know how to set up and assign work schedules.

Set up and generate a work schedule **AZ##** (**##** = your group number) and assign it to your employees.

| Field | Value |
|------------------------------|----------------------------|
| Employee subgroup grouping | 2 |
| Holiday calendar | 99 |
| Personnel subarea grouping | 01 |
| Work schedule rule | AZ## |
| Calendar month from (MMYYYY) | December of previous year |
| Calendar month to (MMYYYY) | January of current year +3 |

1. Generate the work schedule **AZ##** for the work schedule rule you created for a period of three years. As a start date, choose December of the previous year, and as an end date, choose January of the current year + 3.
2. Assign the generated work schedule to your salaried employee, Karin Anderson (**306992##**), starting the first of this month, in the Planned Working Time infotype.

Unit 3

Solution 9

Generate Work Schedules

Business Example

You want to generate a work schedule and assign it to your employees. For this reason, you need to know how to set up and assign work schedules.

Set up and generate a work schedule **AZ##** (**##** = your group number) and assign it to your employees.

| Field | Value |
|------------------------------|----------------------------|
| Employee subgroup grouping | 2 |
| Holiday calendar | 99 |
| Personnel subarea grouping | 01 |
| Work schedule rule | AZ## |
| Calendar month from (MMYYYY) | December of previous year |
| Calendar month to (MMYYYY) | January of current year +3 |

1. Generate the work schedule **AZ##** for the work schedule rule you created for a period of three years. As a start date, choose December of the previous year, and as an end date, choose January of the current year + 3.
 - a) In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Generate Work Schedules Manually*.
 - b) On the Create Work Schedule screen, enter the following values in the respective fields:

| Field | Value |
|------------------------------|---|
| Employee subgroup grouping | 2 |
| Holiday calendar | 99 (Public holiday calendar for your personnel subarea) |
| Personnel subarea grouping | 01 |
| Work schedule rule | AZ## |
| Calendar month from (MMYYYY) | December of previous year |
| Calendar month to (MMYYYY) | January of current year + 3 |



Note:

The instructor may announce a different generation period.

- c) Choose the *Create all* pushbutton and note the message at the bottom of your screen that the work schedule has been generated.

2. Assign the generated work schedule to your salaried employee, Karin Anderson (**306992##**), starting the first of this month, in the Planned Working Time infotype.

- a) On the *Create Work Schedule* screen, choose *System → Create Session*.
- b) On the SAP Easy Access screen, choose *Human Resources → Time Management → Administration → Time Data → Maintain*.

- c) On the *Maintain Time Data* screen, enter the following values in the respective fields:

| Field | Value |
|---------------|-------------------------------------|
| Personnel no. | 306992## (salaried employee) |
| Infotype | 0007 (planned working time) |

- d) Choose *Create*.
- e) On the *Create Planned Working Time* screen, enter the values from the table in the respective fields. Keep all other suggested entries.:

| Field | Value |
|--------------------|----------------------------|
| Start | first of the current month |
| Work schedule rule | AZ## |

- f) Choose *Enter*, and if a warning appears regarding infotype 0008 Basic Pay, press ENTER.
- g) Save your entries.

Unit 3

Exercise 10

Generate Work Schedules for a Rotating Shift

Business Example

You want to generate work schedules with a normal working time and a rotating shift and assign them to your employees. For this reason, you need to know how to set up and assign these work schedules.

Create a work schedule for a rotating shift. Where possible, copy the samples provided in the system, and modify them as required. Finally, assign the generated work schedule to your hourly wage earners.



Hint:

If the system prompts you to enter a country grouping, choose **99 Other Countries**.

1. In Customizing, check if the grouping for work schedules for your personnel subarea **TP##** is **01**. Check if the grouping for daily work schedules for your personnel subarea **TP##** is **01**.
2. Create a break schedule called **PW##** with two dynamic unpaid breaks:
 - After 4 hours, employees are entitled to a 15-minute break.
 - After 6 hours, employees are entitled to a 45-minute break.Use the grouping for daily work schedules **01**.
3. Define the daily work schedules **EA## Early##**, **LA## Late##**, and **NT## Night##** by using the daily work schedules **F-11**, **S-11**, and **N-11**, respectively. Choose the grouping for daily work schedules **01**. Assign the break schedule **PW##** you previously created to the daily work schedules. The details of the daily work schedules are as follows:
 - For the daily work schedule **EA## Early##**, work starts at 05:30, with a planned working time of 7 hours 45 minutes (industry hours).
 - For the daily work schedule **LA## Late##**, work starts at 14:00, with a planned working time of 7 hours 45 minutes (industry hours).
 - For the daily work schedule **NT## Night##**, work starts at 22:30, with a planned working time of 6 hours 15 minutes (industry hours).
4. Create a period work schedule **WP##**. Group the daily work schedules **EA##**, **LA##**, **NT##**, and **OFF** into one period work schedule called **WP##**. The work pattern repeats itself every three weeks. You can copy three weeks of an existing period work schedule. Choose the grouping for daily work schedules **01**. Week 3 should indicate the last 3 days of the week as OFF.

5. Check selection rule for day types. Your employees are required to work on public holidays. Check the selection rule 02. This rule will be referenced later in the work schedule rule.
6. Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your hourly wage earners. Check the public holiday calendar assigned to the personnel subarea *TP##*.
7. Define the work schedule rule **AW##**. Copy the work schedule rule M3-1. Use the employee subgroup grouping *Industrial Workers* and the public holiday calendar assigned to your personnel subarea *TP##*, as well as the personnel subarea grouping for work schedules 01. Use the rule for day types 02. Use your period work schedule *WP##*.
8. Generate work schedule **AW##** (rotating schedule) for a period of three years.
9. Assign work schedule **AW##** to your hourly-wage earner in the Planned Working Time infotype, starting the first of this month.

Unit 3 Solution 10

Generate Work Schedules for a Rotating Shift

Business Example

You want to generate work schedules with a normal working time and a rotating shift and assign them to your employees. For this reason, you need to know how to set up and assign these work schedules.

Create a work schedule for a rotating shift. Where possible, copy the samples provided in the system, and modify them as required. Finally, assign the generated work schedule to your hourly wage earners.



Hint:

If the system prompts you to enter a country grouping, choose 99 Other Countries .

1. In Customizing, check if the grouping for work schedules for your personnel subarea *TP##* is 01. Check if the grouping for daily work schedules for your personnel subarea *TP##* is 01.
 - a) In Customizing, choose *Time Management* → *Work Schedules* → *Personnel Subarea Groupings* → *Group Personnel Subareas for the Work Schedule*.
 - b) On the *Change View “Personnel Subarea Grouping for Work Schedules”*: Overview screen, check the personnel grouping for your personnel subarea *TP##*.
The grouping for daily work schedules for your personnel subarea *TP##*. should be 01.
 - c) Choose *Time Management* → *Work Schedules* → *Personnel Subarea Groupings* → *Group Personnel Subareas for the Daily Work Schedule*.
 - d) On the *Change View “Assignment of PS Grouping for Work Schedules to Daily WS”* screen, check the grouping for daily work schedules for your personnel subarea *TP##*.
The daily work schedule grouping assigned to your personnel subarea *TP##* should be 01. Check to make sure that this assignment already exists.
2. Create a break schedule called **PW##** with two dynamic unpaid breaks:
 - After 4 hours, employees are entitled to a 15-minute break.
 - After 6 hours, employees are entitled to a 45-minute break.Use the grouping for daily work schedules **01**.
 - a) In Customizing, choose *Time Management* → *Work Schedules* → *Daily Work Schedules* → *Define Break Schedules*.
 - b) In the *Choose Activity* dialog box, double-click *Determine Break Schedules*.

- c) On the change view work break schedule: overview screen, copy existing break schedule M3 for Grpg 01. Select both lines and choose the Copy pushbutton.
- d) On the *Change View Work Break Schedule Overview of Selected Set* screen, enter the following values in the respective fields for your two break schedules:

| Field | Value |
|-----------------------------------|--|
| Grpg (Employee subgroup grouping) | 01 |
| Break (Break schedule) | PW## |
| Number | 01 (for your first break schedule) and 02 (for your second break schedule) |
| Unpaid | 0,25 and 0,75 (duration of each break) |
| After | 4,00 and 6,00 (hours the employee must work before he or she is entitled to the break) |

- e) Press Enter and save your entries.
3. Define the daily work schedules **EA## Early##, LA## Late##, and NT## Night##** by using the daily work schedules F-11, S-11, and N-11, respectively. Choose the grouping for daily work schedules 01. Assign the break schedule PW## you previously created to the daily work schedules. The details of the daily work schedules are as follows:
- For the daily work schedule **EA## Early##**, work starts at 05:30, with a planned working time of 7 hours 45 minutes (industry hours).
 - For the daily work schedule **LA## Late##**, work starts at 14:00, with a planned working time of 7 hours 45 minutes (industry hours).
 - For the daily work schedule **NT## Night##**, work starts at 22:30, with a planned working time of 6 hours 15 minutes (industry hours).
- a) In Customizing, choose *Time Management → Work Schedules → Daily Work Schedules → Define Daily Work Schedules*.
 - b) On the *Change View "Daily Work Schedule"*: Overview screen, select the F-11 entry and choose the Copy As pushbutton.
 - c) On the *Change View "Daily Work Schedule"*: *Details of Selected Set* screen, enter the following values in the respective fields:

| Field | Value |
|---|--|
| DWS grouping | 01 |
| Daily work schedule | EA## (in the first field), leave the second field blank, and enter Early## (in the third field) |
| Planned working hours (in the <i>Planned working hours</i> screen area) | 7,75 |
| Planned working time (in the <i>Working time</i> screen area) | 05:30 |

| Field | Value |
|---------------------------|-------|
| Work break schedule | PW## |
| Daily Work Schedule Class | 1 |

- d) Save your entries.
- e) On the Change View "Daily Work Schedule": Overview screen, select the S-11 entry and choose the Copy As pushbutton.
- f) On the Change View "Daily Work Schedule": Details of Selected Set screen, enter the following values in the respective fields:

| Field | Value |
|--|--|
| DWS grouping | 01 |
| Daily work schedule | LA## (in the first field), leave the second field blank, and enter Late## (in the third field) |
| Planned working hours (in the Planned working hours screen area) | 7,75 |
| Planned working time (in the Working time screen area) | 14:00 |
| Work break schedule | PW## |
| Daily Work Schedule Class | 2 |

- g) Save your entries.
- h) On the Change View "Daily Work Schedule": Overview screen, select the N-11 entry and choose the Copy As pushbutton.
- i) On the Change View "Daily Work Schedule": Details of Selected Set screen, enter the following values in the respective fields:

| Field | Value |
|--|---|
| DWS grouping | 01 |
| Daily work schedule | NT## (in the first field), leave the second field blank, and enter Night## (in the third field) |
| Planned working hours (in the Planned working hours screen area) | 6,25 |
| Planned working hours (in the Working time screen area) | 22:30 |
| Work break schedule | PW## |
| Daily Work Schedule Class | 3 |

- j) Save your entries.

4. Create a period work schedule **WP##**. Group the daily work schedules **EA##**, **LA##**, **NT##**, and **OFF** into one period work schedule called **WP##**. The work pattern repeats itself every three weeks. You can copy three weeks of an existing period work schedule. Choose the grouping for daily work schedules **01**. Week 3 should indicate the last 3 days of the week as OFF.
- In Customizing, choose *Time Management → Work Schedules → Period Work Schedules → Define Period Work Schedules*.
 - On the Change View Period Work Schedule: Overview screen, choose all three lines of the existing period work schedule 3-WK and choose the Copy As pushbutton.
 - On the Change View "Period Work Schedule": Overview of Selected Set screen, enter the following values in the respective fields in the three rows:

| Field | Value |
|----------------------------|---|
| Grpg | 01 |
| PWS (Period work schedule) | WP## |
| Week | 001 for your first week, 002 for your second week, and 003 for your third week. |
| 01 to 05 (for Week 1) | EA## |
| 06 and 07 (for Week 1) | OFF |
| 01 to 05 (for Week 2) | LA## |
| 06 and 07 (for Week 2) | OFF |
| 01 to 04 (for Week 3) | NT## |
| 05 to 07 (for Week 3) | OFF |

- Save your entries.
5. Check selection rule for day types. Your employees are required to work on public holidays. Check the selection rule 02. This rule will be referenced later in the work schedule rule.
- In Customizing, choose *Time Management → Work Schedules → Day Types → Define Selection Rules*.
 - On the Change View "Definition Rules for Day Types": Overview screen, verify the selection rule 02. This rule is displayed on the screen as follows:

| Rule | | Weekday | Saturday | Sunday |
|------|--------------------|------------|------------|------------|
| | With holiday class | b123456789 | b123456789 | b123456789 |
| 02 | Gives day type | | | |

Figure 3: Check selection rule for day types

6. Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your hourly wage earners. Check the public holiday calendar assigned to the personnel subarea **TP##**.
- In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Define Employee Subgroup Groupings*.

- b) In the *Choose Activity* dialog box, double-click *Define Employee Subgroup Grouping*.
 - c) On the *Change View "Text for Work Schedule Grouping"*: Overview screen, check whether an employee subgroup grouping for the work schedule already exists for industrial workers.
 - d) Go back to the *Choose Activity* dialog box and double-click *Group Employee Subgroups for Work Schedules*.
 - e) In the *Determine Work Area: Entry* dialog box, enter **99** in the *Work Area* field, and choose *Continue*.
 - f) On the *Change View "Employee Subgroup Grouping for Work Schedule"*: Overview screen, check whether the above employee subgroup grouping for work schedules is already assigned to your employee subgroup for industrial workers (X1). Go back to the Customizing menu. For ESG X1 grouping 1 should be assigned.
 - g) In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Define Groupings for the Public Holiday Calendar*.
 - h) On the *Change View "Assign Personnel Subarea to Public Holiday Calendar"*: Overview screen, check whether a public holiday calendar is already assigned to your personnel subarea *TP##*. The public holiday calendar assigned to your personnel subarea *TP##* should be 99.
7. Define the work schedule rule **AW##**. Copy the work schedule rule *M3-1*. Use the employee subgroup grouping *Industrial Workers* and the public holiday calendar assigned to your personnel subarea *TP##*, as well as the personnel subarea grouping for work schedules *01*. Use the rule for day types *02*. Use your period work schedule *WP##*.

- a) In Customizing, choose *Time Management → Work Schedules → Work Schedule Rules and Work Schedules → Set Work Schedule Rules and Work Schedules*.
- b) On the *Change View "Work Schedule Rule"*: Overview screen, select the *M2-N* entry for hourly-wage earners and choose the *Copy As* pushbutton. Note: Copy entry *M2-N* so the hours are similar to the average daily work schedule. Copying any entry could lead to incorrect average values
- c) On the *Change View "Work Schedule Rule": Details of Selected Set* screen, enter the following values in the respective fields:

| Field | Value |
|-----------------------------|------------------------------------|
| <i>ES grouping</i> | 1 |
| <i>Holiday Calendar ID</i> | 99 |
| <i>PS grouping</i> | 01 |
| <i>Work schedule rule</i> | AW## Name: 3 Week Rotate ## |
| <i>Rule for day types</i> | 02 |
| <i>Period work schedule</i> | WP## |
| <i>Ref. date for PWS</i> | 01/01/1990 |
| <i>Start point in PWS</i> | 001 |

**Note:**

If the work schedule you have copied has any entry in the *Alternative WS rule* field in the *Reduced working hours* area, delete this entry before saving your work schedule rule.

- d) Save your entries.
8. Generate work schedule **AW##** (rotating schedule) for a period of three years.
- a) In Customizing, choose *Time Management* → *Work Schedules* → *Work Schedule Rules and Work Schedules* → *Generate Work Schedules Manually*.
 - b) On the *Create Work Schedule* screen, enter the following values in the respective fields:

| Field | Value |
|-------------------------------------|-------------------------------|
| <i>Employee subgroup grouping</i> | 1 |
| <i>Holiday calendar</i> | 99 |
| <i>Personnel subarea grouping</i> | 01 |
| <i>Work schedule rule</i> | AW## |
| <i>Calendar month from (MMYYYY)</i> | December of previous year |
| <i>to (MMYYYY)</i> | January (of current year + 3) |

**Note:**

The instructor may announce a different generation period.

- c) Choose *Create all*.
9. Assign work schedule **AW##** to your hourly-wage earner in the Planned Working Time infotype, starting the first of this month.
- a) On the *Create Work Schedule* screen, choose *System* → *Create Session*.
 - b) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.
 - c) On the *Maintain Time Data* screen, enter the following values in the respective fields:
- | Field | Value |
|----------------------|-------------------------------------|
| <i>Personnel no.</i> | 306991## (industrial worker) |
| <i>Infotype</i> | 0007 (planned working time) |
- d) Choose the *Create* pushbutton.
 - e) On the *Create Planned Working Time* screen, enter the following values in the respective fields:

| Field | Value |
|--------------------|----------------------------|
| Start | first of the current month |
| Work schedule rule | AW## |

- f) Keep all other suggested entries. Choose *Enter* to confirm your entries and acknowledge any messages.
- g) Save your entries.

Unit 4

Exercise 11

Set Up a Part-Time Work Schedule

Business Example

Some employees at your enterprise work part-time. As a part of your job, you need to set up the part-time work schedule for many of these part-time employees. For this reason, you need to know how to set up part-time work schedules by modifying the existing work schedule rule.

Set up a part-time work schedule for your hourly wage earner whose personnel number is **306991##** (## = your group number).

1. Set the part-time employment percentage to 50% for your hourly wage earner starting on the first of the month after next.

Set Up a Part-Time Work Schedule

Business Example

Some employees at your enterprise work part-time. As a part of your job, you need to set up the part-time work schedule for many of these part-time employees. For this reason, you need to know how to set up part-time work schedules by modifying the existing work schedule rule.

Set up a part-time work schedule for your hourly wage earner whose personnel number is **306991##** (## = your group number).

1. Set the part-time employment percentage to 50% for your hourly wage earner starting on the first of the month after next.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.
 - b) In the *Personnel no.* field, enter the personnel number of your hourly-wage earner **306991##**.
 - c) On the *Time management data* tab page, choose the *Planned Working Time* infotype.
 - d) Choose the *Copy* pushbutton.
 - e) On the *Copy Planned Working Time* screen, enter the first day of the month after next as the start date.
 - f) In the *Employment percent* field, enter **50** and press ENTER. Choose *Enter* to confirm the subsequent warnings. The *Part-time employee* and the *Dyn. daily work schedule* options are automatically set.
 - g) Check how the employee's working times have changed.
 - h) Save your data. Choose *Enter* to confirm the system warning. Choose *Save*.
 - i) If prompted to create a home work center, choose the *Cancel* pushbutton.
 - j) Return to the SAP Easy Access screen.

Unit 5

Exercise 12

Set Up an Absence Type

Business Example

You need to create a new absence type by copying and modifying one of the samples provided in the standard SAP system. Create the absence type *LE##*, call it *Leave Group ##*, and define the following checks.



- If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message.
- If the entire period is a non-working period, you want the administrator to receive an error message.
- There are no restrictions on the maximum duration of the absence.



Hint:

If the system asks you to enter a country grouping, choose *other countries*.

1. Check the appropriate groupings.
2. Create the absence type *LE##* and call it *Leave Group ##*. To do so, copy the absence type *0100 (Leave)*.
3. Define the checks that the system has to perform when an absence is entered. If the start and end of the absence are designated as a non-working period, the administrator must receive a warning message. If the entire period is a non-working period, the administrator must receive an error message.

You do not want any restrictions for the maximum duration for the absence type.

Set Up an Absence Type

Business Example

You need to create a new absence type by copying and modifying one of the samples provided in the standard SAP system. Create the absence type *LE##*, call it *Leave Group ##*, and define the following checks.



- If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message.
- If the entire period is a non-working period, you want the administrator to receive an error message.
- There are no restrictions on the maximum duration of the absence.



Hint:

If the system asks you to enter a country grouping, choose *other countries*.

1. Check the appropriate groupings.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Group Personnel Subareas for Attendances and Absences*.
 - b) On the *Change View Personnel Subarea Grouping for Absence/Attendance Types* screen, check to ensure that the personnel subarea grouping for your personnel subarea *TP##* is *01*.
2. Create the absence type *LE##* and call it *Leave Group ##*. To do so, copy the absence type *0100 (Leave)*.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Define Absence Types*.
 - b) Select the absence type *0100 (Leave)* for the personnel subarea grouping *01* and choose the *Copy As* pushbutton.
 - c) In the *A/A type* field, enter **LE##** and in the *text* field enter **Leave group ##**.
 - d) Remain on this screen.
3. Define the checks that the system has to perform when an absence is entered. If the start and end of the absence are designated as a non-working period, the administrator must receive a warning message. If the entire period is a non-working period, the administrator must receive an error message.

You do not want any restrictions for the maximum duration for the absence type.

- a) In the *First day is day off* and *Last day is day off* fields, enter **w** for warning.
- b) In the *Non-working period* field, enter **E** for error.
- c) In the *Maximum duration* field, enter **999**. Leave the *Unit* field blank for calendar days.
- d) Press ENTER and save your entries.

Unit 6

Exercise 13

Define Counting Rules

Business Example

Employees call in sick, go on vacation, participate in training courses, or go on business trips. You must record attendances and absences correctly for your company. You need to create counting rules to determine the payroll days and hours for attendances and absences. For this reason, you need to know how to define counting rules.

Define a counting rule to determine the payroll days and hours for absences.

1. Define a counting class for the period work schedule that you created. You must make an entry for your period work schedule in the applicable Customizing view, because the counting class of a period work schedule is queried in the counting rules.
2. Define a counting rule with two subrules to be used for your absence type *LE##*. Your personnel subarea *TP##* must be assigned to the personnel subarea grouping for time quotas *01*. The applicable employee subgroups must be assigned to the employee subgroup grouping for time quotas *1*. For these groupings, create counting rule **1##** and name it **Counting rule group ##**.
3. Define a counting rule with subrule **001**. Apply the following specifications to subrule **001**:
 - The absence is to be counted on all seven days of the week.
 - The public holiday class of the day must not be 2, that is, the rule applies on all days except half-day holidays.
 - The absence is counted only if the day is a workday according to the work schedule.
 - Counting occurs for all period work schedules and all daily work schedules.
 - The rule applies only to days with planned hours greater than zero and to days that have full-day and partial-day absences.
 - Hours and days are to be counted as whole amounts (100%) and are rounded to the next whole number. Choose and assign a suitable rounding rule.
 - Absence hours and days are to be multiplied first by the quota multiplier before the values determined for payroll days and hours are rounded.
 - Do not enter any quota deduction rules in the *Deduction rule* section yet.
4. Add another sequence to your Counting rule **1##**. Use a copy of subrule/sequence **001** as a template. Use subrule **001** with the following changes:
 - You want a new counting sequence to apply to days that have the public holiday class 2 (that is, half-day holidays). You want only half of these days to be counted.

- A different rounding rule is to be assigned for counting. Values determined for hours and days are to be rounded to two decimal places. Use rounding rule 04 here.
- Assign the applicable rounding rule in the *Hours* and *Days* sections of the screen. You also want to calculate the values first and then round them.
- For days with the public holiday class 2, hours are to be counted as their full amount. Full-days are to be valued as half-days. Use the rounding rule 04.

Define Counting Rules

Business Example

Employees call in sick, go on vacation, participate in training courses, or go on business trips. You must record attendances and absences correctly for your company. You need to create counting rules to determine the payroll days and hours for attendances and absences. For this reason, you need to know how to define counting rules.

Define a counting rule to determine the payroll days and hours for absences.

1. Define a counting class for the period work schedule that you created. You must make an entry for your period work schedule in the applicable Customizing view, because the counting class of a period work schedule is queried in the counting rules.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Define Counting Classes for the Period Work Schedule*.
 - b) On the *Change View “Period Work Schedule Valuation”*: Overview screen, select the first two entries.
 - c) Choose the *Copy As* pushbutton.
 - d) On the *Change View Period Work Schedule First Valuation: Overview of Selected Set* screen, enter **PZ##** (# = your group number) in the *Period WS* (Period work schedule) field and enter **WP##** in the second period WS field..



Note:

Make sure that you copy the correct personnel subarea grouping (01).

- e) In the *Cntg class* (counting class) field, enter any counting class (between blank and 9).



Note:

The counting class for the period work schedule could be used to differentiate between different period work schedules in a counting rule. If it is not used for this purpose then any counting class can be assigned. Example of usage: the 3 week rotating shift might be assigned a counting class of a 3 while the 4 hour Friday shift might be a 1. Then different counting rules could be created for each class.

- f) Save your entries.

2. Define a counting rule with two subrules to be used for your absence type **LE##**. Your personnel subarea **TP##** must be assigned to the personnel subarea grouping for time quotas **01**. The applicable employee subgroups must be assigned to the employee

subgroup grouping for time quotas 1. For these groupings, create counting rule **1##** and name it **Counting rule group ##**.

- a) On the SAP Easy Access screen, enter **SPRO** in the command field and press ENTER.
 - b) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Rules for Absence Counting (New)* → *Group Employee Subgroups for Time Quotas*.
 - c) In the *Determine Work Area: Entry* dialog box, choose *Continue*.
 - d) On the *Change View "Employee Subgroup Grouping for Time Quotas"*: Overview screen, check the relevant employee subgroups (X0 and X1) to ensure that your employee is assigned to the employee subgroup grouping for time quotas 1.
 - e) Go back to the initial *Customizing* screen and choose *Group Personnel Subareas for Time Quotas*.
 - f) On the *Change View "Personnel Subarea Grouping for Time Quota Type"*: Overview screen, check whether your personnel subarea **TP##** is assigned to the grouping 01.
 - g) To check the rounding rules that you want to assign to your counting rule, return to the initial *Customizing* screen and choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Rules for Absence Counting (New)* → *Define Rules for Rounding Counted Absences*. Rule 01 corresponds to the requirements of this exercise. The values determined are rounded to the next whole amount.
3. Define a counting rule with subrule **001**. Apply the following specifications to subrule 001:
- The absence is to be counted on all seven days of the week.
 - The public holiday class of the day must not be 2, that is, the rule applies on all days except half-day holidays.
 - The absence is counted only if the day is a workday according to the work schedule.
 - Counting occurs for all period work schedules and all daily work schedules.
 - The rule applies only to days with planned hours greater than zero and to days that have full-day and partial-day absences.
 - Hours and days are to be counted as whole amounts (100%) and are rounded to the next whole number. Choose and assign a suitable rounding rule.
 - Absence hours and days are to be multiplied first by the quota multiplier before the values determined for payroll days and hours are rounded.
 - Do not enter any quota deduction rules in the *Deduction rule* section yet.
- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Rules for Absence Counting (New)* → *Define Counting Rules*.
 - b) Choose the *New Entries* pushbutton.
 - c) Enter the following values:

| Field | Value |
|---|----------------------------|
| ESG Time quota types (Employee subgroup grouping) | 1 |
| PS Grpg Tm Quota Typ (Personnel subarea grouping) | 01 |
| Counting rule | 1## Counting rule group ## |
| Sequential no. | 001 |

**Note:**

Because the counting rule has two subrules, you need to enter the sequence number **001** in the *Sequential no.* field.

- d) In the *Conditions for current day* screen area, select the following options or values:

| Section | Option/Value |
|---------------|--|
| Weekday | Select all seven days |
| Holiday class | Select <i>Not a public holiday</i> and the holiday classes 1 and 3 through 9 |
| Day type | <i>Work acc. to work schedule</i> |

- e) In the *Conditions for work schedule* screen area, select the following options or values:

| Section | Option/Value |
|---|---|
| Counting class for period work schedule | Select all options |
| Daily work schedule class | Select all options |
| Condition for planned hours | <i>Planned hours > 0</i> |
| Condition for absence/attendance | Choose both <i>< 1 day</i> and <i>Full-day</i> |

- f) In both *Counting screen section* areas, select the following options or values:

| Section | Option/Value |
|------------------|--------------|
| Quota multiplier | 100 |
| Rounding rule | 01 |

- g) Retain the default option *Multiply first* for both Counting screen sections.

**Note:**

No entries are required in the *Deduction Rule* section at this time.

- h) Save your entries.

4. Add another sequence to your Counting rule 1##. Use a copy of subrule/sequence 001 as a template. Use subrule 001 with the following changes:

- You want a new counting sequence to apply to days that have the public holiday class 2 (that is, half-day holidays). You want only half of these days to be counted.
 - A different rounding rule is to be assigned for counting. Values determined for hours and days are to be rounded to two decimal places. Use rounding rule 04 here.
 - Assign the applicable rounding rule in the *Hours* and *Days* sections of the screen. You also want to calculate the values first and then round them.
 - For days with the public holiday class 2, hours are to be counted as their full amount. Full-days are to be valued as half-days. Use the rounding rule 04.
- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Rules for Absence Counting (New)* → *Define Counting Rules*.
 - b) On the *Change View "Counting rule"*: *Overview* screen, select the subrule 001 you created.
 - c) Choose the *Copy As* pushbutton.
 - d) On the *Change View "Counting rule"*: *Details of Selected Set* screen, enter **002** in the *Sequential no.* field.
 - e) In the *Holiday class* screen area, select *Holiday class 2 - public hol* and deselect all other holiday classes.



Note:

All other conditions in subrule 001 apply.

- f) To count in days, in the *Days* screen area under the *Counting* section enter **50** in the *Quota multiplier* field.
- g) Save your entries.

Unit 6

Exercise 14

Assign a Counting Rule to an Absence Type

Business Example

To ensure that the absences of employees are recorded correctly, you need to apply counting rules to absence types. For this reason, you need to know how to assign a counting rule to an absence type.

Assign the counting rule *1##* (*##* = your group number) to the absence type *LE##*. Check if quota deduction for the absence type *LE##* is already activated.

1. Assign a counting rule to an absence type.

Assign a Counting Rule to an Absence Type

Business Example

To ensure that the absences of employees are recorded correctly, you need to apply counting rules to absence types. For this reason, you need to know how to assign a counting rule to an absence type.

Assign the counting rule **1##** (**##** = your group number) to the absence type **LE##**. Check if quota deduction for the absence type **LE##** is already activated.

1. Assign a counting rule to an absence type.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Assign Counting Rules to Absence Types*.
 - b) On the *Change View Absence: Counting and Quota Deduction: Overview* screen, choose the absence type **LE##** and choose *Goto* → *Details* from the menu bar.
 - c) In the *Counting rule* field for your absence, type **LE##** enter the counting rule **1##**.
 - d) Make sure the *Quota Deduction* field is activated.
 - e) Save your entries.

Unit 7

Exercise 15

Set Up a Quota Type

Business Example

You are responsible for configuring attendance and absence quotas. You have received a request to set up two new absence quota types.

Create a quota type **30+##** called **Leave Group ##** and a quota type **70+##** called **Additional Leave Group ##**. The quotas are to be managed in days, and a deduction beyond the entitlement is not permitted. You can copy or modify quota type **09 (Leave Days)**.
(## = your group number)

1. Create groupings for time quotas.
2. Create absence quota types.

Unit 7

Solution 15

Set Up a Quota Type

Business Example

You are responsible for configuring attendance and absence quotas. You have received a request to set up two new absence quota types.

Create a quota type **30+##** called **Leave Group ##** and a quota type **70+##** called **Additional Leave Group ##**. The quotas are to be managed in days, and a deduction beyond the entitlement is not permitted. You can copy or modify quota type **09** (Leave Days). (**##** = your group number)

1. Create groupings for time quotas.

- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Setting Groupings for Time Quotas* → *Group Employee Subgroups for Time Quotas*.

On the *Determine Work Area*: *Entry* screen, choose *Continue*.

- b) On the *Change View “Employee Subgroup Grouping for Time Quotas”*: Overview screen, check your employee subgroup grouping for X0 (salaried employee) and X1 (hourly-wage earner) in the *ESG Time* quota field.

(Both, the X0 (salaried employee) and X1 (hourly-wage earner), should be assigned to the grouping 1.)

- c) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Setting Groupings for Time Quotas* → *Group Personnel Subareas for Time Quotas*.

- d) On the *Change View “Personnel Subarea Grouping for Time Quota Type”*: Overview screen, check the personnel subarea grouping for your personnel subarea **TP##**.

(The personnel subarea grouping for your personnel subarea **TP##** should be **01**.)

2. Create absence quota types.

- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Time Quota Types* → *Define Absence Quota Types*.

- b) On the *Change View “Absence Quota Type”*: Overview screen, Position pushbutton, enter ESG 1, PSA 01 and quota type 09 to position on an appropriate entry. Choose *Absence quota type 09 [Leave (days)]* and choose the *Copy As* pushbutton.

- c) On the *Change View “Absence Quota Type”*: *Details of Selected Set* screen, enter the following values in the respective fields:

| Field | Value |
|-----------------------------|----------|
| <i>ESG Time quota types</i> | 1 |

| Field | Value |
|----------------------|--------------------------|
| PS Grpg Tm Quota Typ | 01 |
| Absence quota type | 30+## Leave Group |

- d) Press Enter and Save your entries.
- e) On the *Change View "Absence Quota Type"*: Overview screen, select the *Absence quota type 09 [Leave (days)]* and choose the *Copy As* pushbutton.
- f) To use quota type 09 to create a second new quota type, on the *Change View "Absence Quota Type": Details of Selected Set* screen, enter the following values in the respective fields:

| Field | Value |
|----------------------|-------------------------------------|
| ESG Time quota types | 1 |
| PS Grpg Tm Quota Typ | 01 |
| Absence quota type | 70+## Additional Leave Group |



Note:
 Leave the unit of time or measurement *Days* and the existing time constraint class as they are. Do not enter anything in the *Neg. ded. to* field. Quotas of the new time quota type must not be deducted beyond the entitlement.

- g) Press Enter and Save your entries.

Unit 7

Exercise 16

Set Up Deduction Rules

Business Example

Employees in your company have various quota entitlements that must be used in a specific order. You need to set up and assign deduction rules to ensure quotas are deducted in the correct sequence.

Create and assign a quota deduction rule.

When your employees take leave using absence type *LE##*, the quota associated with each leave quota type must be deducted according to the following criteria:



- If an employee is entitled to additional leave, quota type **70+##** (add 70 to your group number), this quota is to be deducted first. Then, the actual leave, quota type **30+##** (add 30 to your group number), is to be deducted. Other absence entitlements to which the employee may be entitled must not be deducted.
 - If an employee has several quotas of the same type, then these quotas are to be deducted so that the quotas that would expire first (that is, their deduction end dates would be reached first) are also deducted first.
 - The quotas must not be deducted beyond the entitlement.
1. Create a quota deduction rule **1##** (where **##** is your group number), in which the sequence of the quotas to be deducted is specified. Quota type **70+##** is to be deducted first, followed by quota type **30+##**. Make sure that no deduction from additional quotas is permitted.

Set Up Deduction Rules

Business Example

Employees in your company have various quota entitlements that must be used in a specific order. You need to set up and assign deduction rules to ensure quotas are deducted in the correct sequence.

Create and assign a quota deduction rule.

When your employees take leave using absence type **LE##**, the quota associated with each leave quota type must be deducted according to the following criteria:



- If an employee is entitled to additional leave, quota type **70+##** (add 70 to your group number), this quota is to be deducted first. Then, the actual leave, quota type **30+##** (add 30 to your group number), is to be deducted. Other absence entitlements to which the employee may be entitled must not be deducted.
 - If an employee has several quotas of the same type, then these quotas are to be deducted so that the quotas that would expire first (that is, their deduction end dates would be reached first) are also deducted first.
 - The quotas must not be deducted beyond the entitlement.
1. Create a quota deduction rule **1##** (where **##** is your group number), in which the sequence of the quotas to be deducted is specified. Quota type **70+##** is to be deducted first, followed by quota type **30+##**. Make sure that no deduction from additional quotas is permitted.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Quota Deduction Using Attendances/Absences* → *Define Deduction Rules for Absence and Attendance Quotas*.
 - b) In the *Choose Activity* dialog box, double-click *Define Deduction Rules for Absence Quotas*.
 - c) On the *Change View “Deduction Rules for Absence Quotas”*: Overview screen, choose the *New Entries* pushbutton.
 - d) On the *New Entries: Details of Added Entries* screen, enter the following values in the respective field:

| Field | Value |
|----------------------|------------|
| ESG Time quota types | 1 |
| PS Grpg Tm Quota Typ | 01 |
| Start | 01/01/1990 |

| Field | Value |
|---|------------------------------------|
| <i>End</i> | 12/31/9999 |
| <i>Deduction rule</i> | 1## Deduction Rule Group ## |
| <i>Unit of relevant absence quota types</i> | <i>Days</i> |
| <i>Absence quota type (in the first row)</i> | 70+## |
| <i>Absence quota type (in the second row)</i> | 30+## |
| <i>Quota type sequence for further deduction</i> | <i>No further deduction</i> |
| <i>Quota types (in the Deduction Priority section)</i> | <i>Priority 1</i> |
| <i>Deduction to (in the Deduction Priority section)</i> | <i>Priority 2</i> |

Retain the default value *Ascending* for the sequence.

- e) Save your entries.

Unit 7

Exercise 17

Assign Quota Deduction Rules

Business Example

As a personnel administrator, you need to make sure that when your employees take leave (absence type **LE##**), the leave quota is reduced accordingly. To do so, you need to assign quota deduction rules.

Assign your quota deduction rule and then activate and check the quota deduction for absence type **LE##**.

(## = your group number)

1. Assign your quota deduction rule to your counting rule. Where do you make this assignment? Make sure that all above conditions are met when you make the assignment.
2. Verify the quota deduction for **LE##**.

Assign Quota Deduction Rules

Business Example

As a personnel administrator, you need to make sure that when your employees take leave (absence type **LE##**), the leave quota is reduced accordingly. To do so, you need to assign quota deduction rules.

Assign your quota deduction rule and then activate and check the quota deduction for absence type **LE##**.

(## = your group number)

1. Assign your quota deduction rule to your counting rule. Where do you make this assignment? Make sure that all above conditions are met when you make the assignment.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Quota Deduction Using Attendances/Absences* → *Assign Deduction Rules to Counting Rules*.
 - b) On the *Change View Counting Rule: Overview* screen, choose the counting rule **1##** and then choose *Details*.
 - c) On the *Change View Counting Rule: Details* screen, scroll to the end of the counting rule.
 - d) In the *Deduction rule* section under *Absence quotas*, enter the quota deduction rule **1##** that you have just created. Specify the quota deduction rule only in the *Within entitlement* field. This ensures that the quotas are not deducted beyond the available entitlement.
 - e) Do this for both sequences of your counting rule.
 - f) Save your entries.
2. Verify the quota deduction for **LE##**.
 - a) To verify your quota deduction for the applicable absence type **LE##**, in Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Absences* → *Absence Catalog* → *Absence Counting* → *Assign Counting Rules to Absence Types*.
 - b) Choose the absence type **LE##** (Leave Group ##), and choose the *Details* pushbutton.
 - c) On the *Change View Absence Counting and Quota Deduction: Details* screen, check whether your counting rule **1##** is assigned to this absence type and confirm the quota deduction is selected (activated).

Unit 7

Exercise 18

Set Up Quota Type Selection Rule Groups

Business Example

Employees are entitled to different quotas based on their position within the company. As the time administrator, you must ensure employees are assigned the correct quotas. To do this, you will use the QUOMO feature to automatically assign employees to a quota type selection rule group based on their position within the organizational structure.

1. Indicate that your new absence quota type *Leave* is to be accrued manually, that is, not by using Time Evaluation.
2. Feature QUOMO:

What does the QUOMO feature do, that is, what is its function? What is the return value of the feature and where is this return value referenced? How is the decision tree for the QUOMO feature structured in the training system? Which return value applies to your employees Karin Anderson (306992##) and Tom Johnson (306991##)?

Set Up Quota Type Selection Rule Groups

Business Example

Employees are entitled to different quotas based on their position within the company. As the time administrator, you must ensure employees are assigned the correct quotas. To do this, you will use the QUOMO feature to automatically assign employees to a quota type selection rule group based on their position within the organizational structure.

1. Indicate that your new absence quota type *Leave* is to be accrued manually, that is, not by using Time Evaluation.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Automatic Accrual of Absence Quotas* → *Permit Quota Generation Without Time Evaluation*.
 - b) Ensure the *No generat.* option is selected for your absence quota type **30+## Leave** and quota type **70+##**. Select the position pushbutton and enter ES grouping 1, PS grouping 01 and Abs. quota type **30+##**. Repeat for quota type **70+##**.
2. Feature QUOMO:
What does the QUOMO feature do, that is, what is its function? What is the return value of the feature and where is this return value referenced? How is the decision tree for the QUOMO feature structured in the training system? Which return value applies to your employees Karin Anderson (306992##) and Tom Johnson (306991##)?
 - a) Function of the QUOMO feature:
The QUOMO feature specifies which quota type selection rule group employees are to be assigned to depending on their organizational assignment. Quota type selection rules will be specified for this quota type selection rule group in a later step to specify how absence quotas are accrued.
 - b) Structure of the decision tree of the feature QUOMO in the training system:
In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Specify Rule Groups for Quota Type Selection*.
 - c) In the *Choose Activity* dialog box, double-click *Modify Feature QUOMO*. The *Process feature QUOMO: decision tree* screen displays.



Hint:

You can also maintain the feature directly by calling transaction PE03.

- The decision tree for the feature is already set up. Confirm the following details:
 - In the decision tree, the country grouping (MOLGA) is queried first.
 - Expand: 99 Other Countries; the system then queries the personnel area (WERKS).
 - Expand: WERKS Personnel Area; For the Personnel Area CABB, the BTRTL Personnel Subarea is queried.
 - Expand BTRTL Personnel Subarea; the system displays a list of Personnel Subareas.
 - Expand your Personnel Subarea TP##. The return value **##+30** is set. As a result of the configuration of this feature, the quota type selection rule group **##+30** applies to the employees in Personnel Subarea *TP##*.

Unit 7

Exercise 19

Define Base Entitlements



Business Example

Employees in your company are entitled to different leave entitlements based on their seniority. Employees with 0 – 5 years of service are entitled to 25 days of leave. Employees with more than 5 years of service are entitled to 28 days of leave. As the time administrator, you are responsible for ensuring the correct base entitlements are assigned to employees. To set up these entitlements, you create a base entitlement rule and apply it to the quota type for the leave entitlement.

For your absence quota type **30+##**, create the base entitlement rule 001 and name it Base Entitlement Leave Group **##**. You must set up two subrules to accommodate the different leave entitlements defined by seniority.

Set up the following leave regulation for the employees in your personnel subarea:



- Employees with 0–5 years' seniority are entitled to 25 days of leave (quota type **30+##**) per year.
- Employees with more than 5 years' seniority are entitled to 28 days of leave (quota type **30+##**) per year.

1. Create a base entitlement rule 001 and call it Base Entitlement Leave Group **##**. Create the subrules 001 and 002. Use the calendar year as the period on which the base entitlement is based.

| • Field | Value |
|--|-------------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| <i>ES grp (Employee subgroup grouping) for time quotas</i> | 1 |
| <i>PS grp (Personnel subarea grouping) for time quotas</i> | 01 |
| <i>Personnel subarea grouping for time recording</i> | 01 |
| Absence quota type | 30+## |
| Rule for base entitlement | 001 |
| Sequential no. | 001 |
| Seniority | 0–5 years |
| Constant | 25 (days) |

| Field | Value |
|--------------------------|----------------------|
| <i>Related to period</i> | Calendar year |

Define Base Entitlements



Business Example

Employees in your company are entitled to different leave entitlements based on their seniority. Employees with 0 – 5 years of service are entitled to 25 days of leave. Employees with more than 5 years of service are entitled to 28 days of leave. As the time administrator, you are responsible for ensuring the correct base entitlements are assigned to employees. To set up these entitlements, you create a base entitlement rule and apply it to the quota type for the leave entitlement.

For your absence quota type **30+##**, create the base entitlement rule 001 and name it Base Entitlement Leave Group **##**. You must set up two subrules to accommodate the different leave entitlements defined by seniority.

Set up the following leave regulation for the employees in your personnel subarea:



- Employees with 0–5 years' seniority are entitled to 25 days of leave (quota type **30+##**) per year.
- Employees with more than 5 years' seniority are entitled to 28 days of leave (quota type **30+##**) per year.

1. Create a base entitlement rule 001 and call it Base Entitlement Leave Group **##**. Create the subrules 001 and 002. Use the calendar year as the period on which the base entitlement is based.

| Field | Value |
|---|-------------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| ES grp (Employee subgroup grouping) for time quotas | 1 |
| PS grp (Personnel subarea grouping) for time quotas | 01 |
| Personnel subarea grouping for time recording | 01 |
| Absence quota type | 30+## |
| Rule for base entitlement | 001 |
| Sequential no. | 001 |
| Seniority | 0–5 years |
| Constant | 25 (days) |

| Field | Value |
|-------------------|---------------|
| Related to period | Calendar year |

- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Set Base Entitlements*.
- b) In the *Choose Activity* dialog box, choose *Base Entitlement for Absence Quota Generation*.
- c) To create new rules for base entitlements, choose the *New Entries* pushbutton.
- d) Create a base entitlement rule **001** for the quota type **30+##**, leave group **##**, and call it **Base entitlement leave group ##**. You have to create two subrules (001 and 002) because your employees have different base entitlements depending on their level of seniority.
Base entitlement for employees with 0–5 years' seniority.
On the *New Entries: Details of Added Entries* screen, enter the given data for the first subrule 001.
- e) Save your entries and go back to the overview screen.
Base entitlement for employees with seniority of more than 5 years.
- f) To create subrule 002, select your entry for quota type **30+##** and then choose the *Copy As* pushbutton.

**Note:**

You can choose the position pushbutton and enter ES grouping 1, PS grouping 01 in both fields and Abs. quota type 30+## to find your new entry.

- g) On the *Change View Base Entitlement for Absence Quota Generation: Details* screen, make the following changes:

| Field | Value |
|-------------------|---------------|
| Sequential no | 002 |
| Seniority | 5–99 years |
| Constant | 28 (days) |
| Related to period | Calendar year |

- h) Choose *Continue* to confirm your entries, save your entries, and go back to the Overview screen.

Unit 7

Exercise 20

Set Up Validity and Deduction Intervals

Business Example

As the time administrator, you have completed the setup of a new absence quota type **30+##**, for the employees of your company. Because this absence quota type is to be valid for the current year, you must now set up the validity interval. Employees must take this quota by the end of March of the following year. You must also set up a deduction interval to ensure the quota is handled correctly in the system. Employees are not permitted to use any of the new quota until they have completed their probationary period. You must set up this restriction.

Define validity and deduction intervals using the quota type selection rule **30+##** and absence quota type **30+##**.

1. Define validity and deduction intervals (**30+##**). Use the current calendar year as the validity interval for the quota. The quota can be deducted from the start of the validity period until March 31 of the subsequent year. In addition, quota deduction cannot begin until after an employee's probationary period is completed.
2. Define the deduction interval.

Set Up Validity and Deduction Intervals

Business Example

As the time administrator, you have completed the setup of a new absence quota type **30+##**, for the employees of your company. Because this absence quota type is to be valid for the current year, you must now set up the validity interval. Employees must take this quota by the end of March of the following year. You must also set up a deduction interval to ensure the quota is handled correctly in the system. Employees are not permitted to use any of the new quota until they have completed their probationary period. You must set up this restriction.

Define validity and deduction intervals using the quota type selection rule **30+##** and absence quota type **30+##**.

1. Define validity and deduction intervals (**30+##**). Use the current calendar year as the validity interval for the quota. The quota can be deducted from the start of the validity period until March 31 of the subsequent year. In addition, quota deduction cannot begin until after an employee's probationary period is completed.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Setting up Methods for Quota Accrual* → *Set Up Automatic Accrual Using Report RPTQTA00*.
 - b) In the *Choose Activity* dialog box, choose *Set Validity Interval for Quota Accrual*.
 - c) Choose the *New Entries* pushbutton and enter the following data:

| Field | Value |
|--|---------------------------------|
| <i>ES grp (Employee subgroup grouping) for time quotas</i> | 1 |
| <i>PS grp (Personnel subarea grouping) for time quotas</i> | 01 |
| <i>Quota type sel grp (Quota type selection rule grouping)</i> | 30+## |
| <i>Valid from date</i> | Calendar year: Beginning |
| <i>Valid to date</i> | Calendar year: End |

- d) Save your entries.

**Note:**

The validity interval for the quota to be accrued is defined for a quota type selection rule group. Consequently, the same validity interval is the default for all quotas with this quota type selection rule group (according to rules).

2. Define the deduction interval.

- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Determine Validity and Deduction Periods*.

**Note:**

As stated above the validity interval will be the same for each quota group as defined in feature QUOMO. However each quota type within the group could have different deduction intervals. Therefore, in this next step it is only necessary to define the deduction intervals here. The same validity interval for all quotas within the group has already been created in the prior step.

- b) Choose the *New Entries* pushbutton and enter the following data:

**Note:**

Since there may be similar names for tasks on infotype 0019, turn your keys on to be sure to select subtype 01 Expiry of Probation. To do so, choose Customizing of Local Layout -> Options -> Interaction Design -> Visualization 1. In the right panel, under Control select both checkboxes Show keys in all dropdown lists and Sort items by the Key. At the bottom of the dialog box choose Apply and OK. You can now see the key for the subtypes of infotype 0019 in the possible entries list. Note: The entries will not be sorted until you refresh your screen.

| Field | Value |
|---|-----------------------------------|
| ESG Time quota types | 1 |
| PS Grpg Tm Quota Typ (Personnel subarea grouping for time quotas) | 01 |
| Absence quota type | 30+## |
| Deduction from | Select Start of validity interval |
| No deduction before | Select 01 Expiry of probation |
| Deduction to | Select End of validity interval |
| Relative position | 3 months |

- c) Save your entries.



Note:

Unlike the validity interval, the deduction interval is determined for each quota type. In this way, a deduction interval can be set for individual quota types.

Unit 7

Exercise 21

Set Up Reduction Rules

Business Example

If an employee joins the company during midyear, you want the default leave entitlement to be less than the actual leave entitlement that is on a pro rata basis. For this reason, you need to create a reduction rule and name it accordingly. Use the accrual period as the base period for reduction.

Create reduction rule **30+##** (**##** = your group number)

1. Define reduction rules for quota entitlements (**30+##**)

Set Up Reduction Rules

Business Example

If an employee joins the company during midyear, you want the default leave entitlement to be less than the actual leave entitlement that is on a pro rata basis. For this reason, you need to create a reduction rule and name it accordingly. Use the accrual period as the base period for reduction.

Create reduction rule **30+##** (**##** = your group number)

1. Define reduction rules for quota entitlements (30+##)

- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Rules for Reducing Quota Entitlements*.
- b) In the *Choose Activity* dialog box, choose *Define Reduction Rules*.
- c) On the *Change View Reduction Rules for Absence Quota Generation: Overview* screen, choose the *New Entries* pushbutton.
- d) Enter the following data:
 - In the *Reduction rule* field, enter **30+##** with the description *Reduction rule for inactive days group ##*.
 - In the *Reduction rule for part-time employees* section, select the *Employment pct. From Plnd Working Time infotype* radio button in the *Basic data* screen area.
 - In the *Reduction rule for inactive days* section, select the *Accrual period* radio button in the *Reference period* screen area.Enter **0** in the *Pct. of inactive calendar days* field.
 - In the *From Percentage* area, select the *Proportionate reduction* radio button..
- e) Save your entries. Confirm the warning message by choosing *Enter*.



Note:

Choose *Enter* to confirm the warning concerning the SAP namespace in this exercise. A number is used here as the name of the reduction rule.

Unit 7

Exercise 22

Create Rounding Rules

Business Example

Attendances and absences of employees must be recorded for your company. Employees call in sick, go on vacation, participate in training courses, or go on business trips. After creating counting rules, you want to round the total calculated time to full days when determining total entitlement. For this reason, you need to check whether an appropriate rounding rule already exists.

Define rounding rules for quota selection.

1. Check whether an appropriate rounding rule already exists to round up or down to whole values.



Note:

Rounding rule *O1* is suitable for this exercise.

Create Rounding Rules

Business Example

Attendances and absences of employees must be recorded for your company. Employees call in sick, go on vacation, participate in training courses, or go on business trips. After creating counting rules, you want to round the total calculated time to full days when determining total entitlement. For this reason, you need to check whether an appropriate rounding rule already exists.

Define rounding rules for quota selection.

1. Check whether an appropriate rounding rule already exists to round up or down to whole values.
 - a) In Customizing, choose: *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Rules for Rounding Quota Entitlements*.
 - b) Check the rounding values of the rounding rule 01.



Note:

Rounding rule 01 is suitable for this exercise.

Unit 7

Exercise 23

Set Up Generation Rules for Quota Accruals

Business Example

As a part of your work, you created the quota types required in your company (leave, educational leave, and so on). The same leave entitlement is granted to all employees annually. The amount of entitlement is dependent on the employee's seniority. For this reason, you need to define the generation rules for accruing your employees' leave entitlement.

Define generation rules for quota selection.

You want to create a selection rule for quota accrual **30+##** (*Leave Group ##*) for the employees in your personnel area.

What are the employee subgroup groupings and personnel subarea groupings called?

Employee subgroup grouping for time quotas: 1

Personnel subarea grouping for time quotas: 01

Personnel subarea grouping for time recording: 01

For which quota type selection rule group are the selection rule and generation rule valid?

Check the decision tree for the QUOMO feature again.

Write down the quota type selection rule group here: **30+##**

For the applicable groupings and quota type selection rule group, create the selection rule **001**, and name it **Leave accrual ##**. This selection rule is to be used for accruing absence quota type **30+##** (where **##** = your group number).



The following specifications are valid for this selection rule:

- It applies to all employees in your personnel subarea, regardless of their length of service with the company and challenge group or degree of challenge.
- The accrual period is one calendar year.
- You must specify the rule for base entitlement that you created. Seniority is to be determined for an exact date.
- You must set up pro rata reduction of quota entitlement for employees joining or leaving the enterprise midyear.
- The total entitlement determined is rounded off so that only full days are used.



Note:

The QUOMO feature is used to determine the quota type selection rule group that is to apply to the employees. This is based on employees' organizational assignment. Selection rules are then stored for this quota type selection rule group to regulate the quota accrual. For this reason, you need to check the decision tree for the QUOMO feature to see which quota type selection rule group was set for the employees in your personnel subarea. The quota type selection rule group should be 30+##.

1. Ensure that the quota type selection rule group is 30+##.
2. Define the generation rules for quota accrual.

Set Up Generation Rules for Quota Accruals

Business Example

As a part of your work, you created the quota types required in your company (leave, educational leave, and so on). The same leave entitlement is granted to all employees annually. The amount of entitlement is dependent on the employee's seniority. For this reason, you need to define the generation rules for accruing your employees' leave entitlement.

Define generation rules for quota selection.

You want to create a selection rule for quota accrual **30+##** (*Leave Group ##*) for the employees in your personnel area.

What are the employee subgroup groupings and personnel subarea groupings called?

Employee subgroup grouping for time quotas: 1

Personnel subarea grouping for time quotas: 01

Personnel subarea grouping for time recording: 01

For which quota type selection rule group are the selection rule and generation rule valid?

Check the decision tree for the QUOMO feature again.

Write down the quota type selection rule group here: **30+##**

For the applicable groupings and quota type selection rule group, create the selection rule **001**, and name it **Leave accrual ##**. This selection rule is to be used for accruing absence quota type **30+##** (where **##** = your group number).



The following specifications are valid for this selection rule:

- It applies to all employees in your personnel subarea, regardless of their length of service with the company and challenge group or degree of challenge.
- The accrual period is one calendar year.
- You must specify the rule for base entitlement that you created. Seniority is to be determined for an exact date.
- You must set up pro rata reduction of quota entitlement for employees joining or leaving the enterprise midyear.
- The total entitlement determined is rounded off so that only full days are used.

**Note:**

The QUOMO feature is used to determine the quota type selection rule group that is to apply to the employees. This is based on employees' organizational assignment. Selection rules are then stored for this quota type selection rule group to regulate the quota accrual. For this reason, you need to check the decision tree for the QUOMO feature to see which quota type selection rule group was set for the employees in your personnel subarea. The quota type selection rule group should be 30+##.

1. Ensure that the quota type selection rule group is 30+##.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Specify Rule Groups for Quota Type Selection*.
 - b) In the *Choose Activity* dialog box, choose *Modify Feature QUOMO*. Verify that personnel subarea TP## is assigned the selection rule group 30+##.
2. Define the generation rules for quota accrual.
 - a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Define Generation Rules for Quota Type Selection*.
 - b) On the *Change View "Selection rules": Overview* screen, choose the *New Entries* pushbutton and enter or check the following data:

| Field | Value |
|---------------------|------------------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| ESG for time quotas | 1 |
| PSG for time quotas | 01 |
| PSG for time rec. | 01 |
| Quota type sel. grp | 30+## |
| Selection rule | 001 |
| Absence quota type | 30+## (Leave Group ##) |

- c) Enter the following data on the following tab pages:

On the *Base entitlement* tab page:

| Field | Value |
|------------------------------------|----------------------|
| Rule for base entitlement | 001 |
| Key Date for Determining Seniority | Select For Exact Day |

On the *Applicability* tab page, accept all default values.

On the *Accrual period* tab page:

| Field | Value |
|----------------------|--------------------------|
| <i>Calendar year</i> | Select this radio button |

On the *Accrual entitl* tab page, choose:

| Field | Value |
|-----------------------|--------------|
| <i>Reduction rule</i> | 30+## |

On the *Total entitl* tab page, choose:



Note:

Note: If your company does not round absences, you may elect to not assign a rounding rule here.

| Field | Value |
|----------------------|-----------|
| <i>Rounding rule</i> | 01 |

- d) Save your entries.



Note:

By using the dialog structure in the left section of the screen, you can access the relevant views for generation rules.

Unit 7

Exercise 24

Set Up the Accrual of Additional Absence Quota Entitlements

Business Example

As part of your job, you need to grant three days of additional leave per year to the employees in your personnel areas (quota type **70+##**). For this reason, you need to create a base entitlement rule for quota type **70+##** (3 days' entitlement per calendar year).



Note:

In some countries, this is required. In Germany, for example, challenged employees are required to be granted additional leave based on their degree of challenge. In the USA, some employees are entitled to additional leave as part of workers' compensation.

Accrue entitlements of different quota types for employees.

Create a base entitlement rule 001 for the quota type **70+##** Leave group ## and call it *Base entitlement addl leave group ##*. This rule contains no subrules.

1. Define base entitlements (**70+##**).
2. Define the validity interval.
3. Define the deduction interval (**70+##**).
4. Identify existing reduction and rounding rules for quota entitlements (**70+##**) that will be assigned to your new quota entitlement.

In the case of employees who join or leave the company midyear, you want the leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata. You want to round up or down to full days when determining total entitlement.

Use the reduction and rounding rules that you already created. These rules are as follows and will be assigned to your rules in subsequent steps.

| Field | Value |
|----------------|--|
| Reduction rule | 30+## (Reduction rule for inactive days group ##) |
| Rounding rule | 01 (Rounding rule: To nearest whole number) |

5. Define generation rules for quota selection (**70+##**).

Enter a selection rule with the ID 002 for accruing additional quota **70+##**.

Name this selection rule **Accrual addl leave 70+##**.

The following specifications are valid for this selection rule:

- The rule applies to all employees in your personnel subarea, regardless of their length of service with the company and challenge group or degree of challenge.
- The accrual period is one calendar year.
- You must specify the rule for base entitlement that you created.
- You must set up pro rata reduction of quota entitlement for employees joining or leaving the company midyear.
- The total entitlement determined is to be rounded so that only full days are used.

6. Use RPTQUOTA_CHECK to check generation rules.

Use the RPTQUOTA_CHECK report to check your Customizing settings for Tom Johnson (**306991##**) and Karin Anderson (**306992##**). Display the error list, if any, and correct any errors in the settings as required.

Set Up the Accrual of Additional Absence Quota Entitlements

Business Example

As part of your job, you need to grant three days of additional leave per year to the employees in your personnel areas (quota type **70+##**). For this reason, you need to create a base entitlement rule for quota type **70+##** (3 days' entitlement per calendar year).



Note:

In some countries, this is required. In Germany, for example, challenged employees are required to be granted additional leave based on their degree of challenge. In the USA, some employees are entitled to additional leave as part of workers' compensation.

Accrue entitlements of different quota types for employees.

Create a base entitlement rule **001** for the quota type **70+##** Leave group ## and call it *Base entitlement addl leave group ##*. This rule contains no subrules.

1. Define base entitlements (**70+##**).

- a) In Customizing, choose *Time Management* → *Time Data Recording and Administration* → *Managing Time Accounts Using Attendance/Absence Quotas* → *Calculating Absence Entitlements* → *Rules for Generating Absence Quotas* → *Set Base Entitlements*.
- b) In the *Choose Activity* dialog box, choose *Base Entitlement for Absence Quota Generation*.
- c) On the *Change View Base Entitlement for Absence Quota Generation: Overview* screen, choose the *New Entries* pushbutton.
- d) Make the following entries for rule **001**:

| Field | Value |
|---------------------------|------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| ES grp for time quotas | 1 |
| PS grp for time quotas | 01 |
| PS grp for time recording | 01 |
| Absence quota type | 70+## |

| Field | Value |
|--|--------------------------|
| Rule for base entitlement | 001 |
| Sequential no. | leave blank |
| Constant (In the Entitlement screen area) | 3 days |
| Calendar year (In the related to period screen area) | Select this radio button |

- e) Save your entries and go back to the Overview screen.
2. Define the validity interval.
- a) The validity interval is set for each quota type selection rule group, so you do not have to make any other entries.
3. Define the deduction interval (**70+##**).
- a) In Customizing, choose *Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Determine Validity and Deduction Periods*.
- b) On the *Change View Validity/Deduction Interval for Absence Quotas: Overview* page, choose the *New Entries* pushbutton and enter the following data:

| Field | Value |
|----------------------|-----------------------------------|
| ESG Time quota types | 1 |
| PS Grpg Tm Quota Typ | 01 |
| Absence quota type | 70+## |
| Deduction from | <i>Start of validity interval</i> |
| Deduction to | <i>End of validity interval</i> |
| Relative position | leave blank |

- c) Save your entries.
4. Identify existing reduction and rounding rules for quota entitlements (**70+##**) that will be assigned to your new quota entitlement.
- In the case of employees who join or leave the company midyear, you want the leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata. You want to round up or down to full days when determining total entitlement. Use the reduction and rounding rules that you already created. These rules are as follows and will be assigned to your rules in subsequent steps.

| Field | Value |
|----------------|--|
| Reduction rule | 30+## (Reduction rule for inactive days group ##) |
| Rounding rule | 01 (Rounding rule: To nearest whole number) |

5. Define generation rules for quota selection (**70+##**).

Enter a selection rule with the ID 002 for accruing additional quota **70+##**.

Name this selection rule **Accrual addl leave 70+##**.

The following specifications are valid for this selection rule:

- The rule applies to all employees in your personnel subarea, regardless of their length of service with the company and challenge group or degree of challenge.
- The accrual period is one calendar year.
- You must specify the rule for base entitlement that you created.
- You must set up pro rata reduction of quota entitlement for employees joining or leaving the company midyear.
- The total entitlement determined is to be rounded so that only full days are used.

- a) In Customizing, choose *Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Rules for Generating Absence Quotas → Define Generation Rules for Quota Type Selection*.
- b) On the *Change View Selection rules: Overview* screen, choose the *New entries* pushbutton and enter the following data:

| Field | Value |
|---------------------|-----------------------------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| ESG for time quotas | 1 |
| PSG for time quotas | 01 |
| PSG for time rec. | 01 |
| Quota type sel. grp | 30+## |
| Selection rule | 002 (Accrual of additional leave) |
| Absence quota type | 70+## (Additional Leave) |

- c) On the *Base entitl.* tab page, enter the following information:

| Field | Value |
|---------------------------|-------|
| Rule for base entitlement | 001 |

- d) On the *Applicability* tab page, adopt the default settings.

- e) On the *Accrual period* tab page, select *Calendar year*.

- f) On the *Accrual entitl.* tab page, enter the following information:

| Field | Value |
|----------------|-------|
| Reduction rule | 30+## |

- g) On the *Total entitl.* tab page, enter the following information:

| Field | Value |
|----------------------|-------|
| <i>Rounding rule</i> | 01 |

- h) Save your entries.

6. Use RPTQUOTA_CHECK to check generation rules.

Use the RPTQUOTA_CHECK report to check your Customizing settings for Tom Johnson (**306991##**) and Karin Anderson (**306992##**). Display the error list, if any, and correct any errors in the settings as required.

- a) To start the report, from the main menu bar, choose *System → Services → Reporting* (or call transaction **SE38**).
- b) On the *ABAP: Program Execution* screen, enter the following data:

| Field | Value |
|----------------|-----------------------|
| <i>Program</i> | RPTQUOTA_CHECK |

- c) Choose the *Execute* pushbutton.

- d) On the *Overview of Customizing Settings for Quota Generation* screen, enter the following data:

| Field | Value |
|---|-------------------------------|
| <i>Personnel Number</i> | 306991## (Tom Johnson) |
| <i>Generation by RPTQTA00 Report and Default Values</i> (In the <i>Selection of Quotas</i> screen area) | Select this radio button |

- e) Choose the *Execute* pushbutton.

- f) Check the settings in the report output. Choose the *Error List* pushbutton to display any errors.

- g) If there are errors, correct them in Customizing.

Unit 7

Exercise 25

Generate Quotas for Employees

Business Example

As a part of your job, you create the quota types required in your company (leave, educational leave, and so on). The same leave entitlement is granted to all employees on an annual basis. For this reason, you need to generate leave quota for the current year.

Define quotas for employees.

1. Generate the leave quota for the current year for your employees Tom Johnson (306991##) and Karin Anderson (306992##). Use the report RPTQTA00 to do this. Choose the generate batch input session option. (## = your group number).
2. Run the generated batch input session for employees to receive their leave entitlements.
3. Check the leave entitlement.

Generate Quotas for Employees

Business Example

As a part of your job, you create the quota types required in your company (leave, educational leave, and so on). The same leave entitlement is granted to all employees on an annual basis. For this reason, you need to generate leave quota for the current year.

Define quotas for employees.

1. Generate the leave quota for the current year for your employees Tom Johnson (306991##) and Karin Anderson (306992##). Use the report RPTQTA00 to do this. Choose the generate batch input session option. (## = your group number).
 - a) In Customizing, choose *Time Management → Time Data Recording and Administration → Managing Time Accounts Using Attendance/Absence Quotas → Calculating Absence Entitlements → Setting Up Methods for Quota Accrual → Set Up Automatic Accrual Using Report RPTQTA00*.
 - b) In the *Choose Activity* dialog box, choose the *Set Up Report Variants for Absence Quota Accrual* activity. The RPTQTA00 report is displayed on the following screen.
 - c) In the *ABAP: Program Execution* dialog box, choose the *Execute* pushbutton.
 - d) On the *Generate Absence Quotas* screen, enter the following values:

| Field | Value |
|------------------|-----------------------|
| Period | Current year |
| Personnel Number | 306991## and 306992## |
| Generation type | Batch input (choose) |

In the *Output options* screen area, select *Display only new quota records*.

- e) Choose the *Execute* pushbutton.
2. Run the generated batch input session for employees to receive their leave entitlements.
 - a) On the *Generate Absence Quotas* screen, choose *System → Services → Batch Input → Sessions*.
 - b) On the *Batch Input: Session Overview* screen, select the session you created and choose the *Process* pushbutton.
 - c) In the *Process Session RPTQTA00* dialog box, select *Display errors only* and confirm by choosing *Enter*.
The batch input session runs and generates leave entitlement for the appropriate employees.
3. Check the leave entitlement.

- a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Display*.
- b) On the *Display Time Data* screen, enter the personnel number of one of your employees (**306991##** or **306992##**) or use the input help.
- c) On the *Time quotas* tab page, select *Absence Quotas*; choose *Current year* as the period.
- d) Choose the *Overview* pushbutton. The employee's leave entitlement is listed.
- e) Similarly, check the leave entitlement of your second employee.

Unit 7

Exercise 26

Create an Employee Absence to Test Generated Quotas

Business Example

When employees take a leave, as part of your job, you must create a leave record and ensure that the leave is deducted from the correct quota. For this reason, you must know how to create a leave record using infotype maintenance and check the quota overview for your employees.

Represent an employee's leave using infotype maintenance.

1. Create a full week's leave for your salaried employee, Karin Anderson (306992##), for the next week. Use the absence type *LE##*. In addition, check what amount of quota is used.
2. Check from which quota the leave is deducted. In addition, check the quota overview for your salaried employee for the current year.

Unit 7 Solution 26

Create an Employee Absence to Test Generated Quotas

Business Example

When employees take a leave, as part of your job, you must create a leave record and ensure that the leave is deducted from the correct quota. For this reason, you must know how to create a leave record using infotype maintenance and check the quota overview for your employees.

Represent an employee's leave using infotype maintenance.

1. Create a full week's leave for your salaried employee, Karin Anderson (306992##), for the next week. Use the absence type *LE##*. In addition, check what amount of quota is used.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Maintain*.
 - b) On the *Maintain Time Data* screen, in the *Personnel no.* field, enter **306992##** as the personnel number for your salaried employee, or use the input help.
 - c) On the *Working times* tab page, choose *Absences* and enter the following data:

| Field | Value |
|-------|------------------------------|
| STy | <i>LE## (Leave Group ##)</i> |
| From | Monday of the following week |
| To | Friday of the following week |

- d) Choose the *Create* pushbutton. On the *Create Absences* screen, the payroll days are displayed in the *Quota used* field.
 - e) Choose *Goto* → *Deduction* to check the quotas from which the absence was deducted for this period and in the *Display Quota Deduction* dialog box, choose *Continue*.
 - f) Save your entries.
2. Check from which quota the leave is deducted. In addition, check the quota overview for your salaried employee for the current year.
 - a) On the SAP Easy Access screen, choose *Human Resources* → *Time Management* → *Administration* → *Time Data* → *Quota Overview*.
 - b) In the *Personnel No.* field on the *Quota Overview* screen, enter the personnel number of your salaried employee **306992##**.
 - c) On the *Selection dates* tab page, choose the *Calendar year* pushbutton in the *Selection intervals* section.
 - d) Choose the *Absence quotas* tab page and check which quotas exist and which have already been used.

Unit 8

Exercise 27

Create Time Data IDs

Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each time administrator. You must carry out the required Customizing steps and create suitable time data IDs and profiles for the time administrators.

Modify the definition set *SET_XX* to include additional time data IDs that will enable special absence types and changes to planned specifications to be recorded in the TMW.

1. Create the following time data IDs:

Time data ID *L##* (Leave group ##) (where ## = your group number) for the absence type you previously created:

- Absences (infotype 2001)
- Personnel subarea grouping 01
- Absence type *LE##*

Time data ID *N##* (Normal group ##) for the following change in planned specifications:

- Substitutions (infotype 2003)
- Personnel subarea grouping 01
- Daily work schedule grouping 01
- Substitution type 02
- Daily work schedule *TZ##*

2. For the time data IDs you created, determine how they are to be used within the subsets of the definition set *SET_XX*. Check whether the subsets 001 and 002 are already available in the definition set *SET_XX*.
3. Define the use of time data IDs for subset 002 in the definition set *SET_XX* so that time administrators can record time data using these time data IDs. To do so, indicate that the newly created time data IDs are to be the *default IDs* for subset 002.
4. Define colors for the calendar view for your own time data IDs, *L##* and *N##*, in the *SET_XX* definition set. Choose the colors of your choice.

Create Time Data IDs

Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each time administrator. You must carry out the required Customizing steps and create suitable time data IDs and profiles for the time administrators.

Modify the definition set *SET_XX* to include additional time data IDs that will enable special absence types and changes to planned specifications to be recorded in the TMW.

1. Create the following time data IDs:

Time data ID L## (Leave group ##) (where ## = your group number) for the absence type you previously created:

- Absences (infotype 2001)
- Personnel subarea grouping 01
- Absence type *LE##*

Time data ID N## (Normal group ##) for the following change in planned specifications:

- Substitutions (infotype 2003)
- Personnel subarea grouping 01
- Daily work schedule grouping 01
- Substitution type 02
- Daily work schedule *TZ##*

a) In Customizing, choose *Time Management* → *Time Manager's Workplace* → *IDs for Time Data* → *Specify Definition Sets and IDs*.

b) In the *Choose Activity* dialog box, choose *Create Definition Sets*.

c) Check that an entry already exists for the definition set *SET_XX*.

d) Create time data ID L##:

Go back to the *Choose Activity* dialog box. In the *Choose Activity* dialog box, choose *Define IDs for Each Time Data Type*. Choose *New Entries*. On the *New Entries: Details of Added Entries* screen, choose the *Absences* tab page and enter the following data:

| Field Name | Value |
|-----------------------|---------------|
| <i>Definition set</i> | SET_XX |
| <i>ID</i> | L## |

| Field Name | Value |
|--------------|-----------------------|
| Short text | Leave Group ## |
| PS grouping | 01 |
| Absence type | LE## |

e) Create time data ID N##:

Choose the *Next Entry* pushbutton. On the *New Entries: Details of Added Entries* screen, choose the *Plnd specs* tab page and enter the following data:

| Field Name | Value |
|-------------------|--------------------------------|
| Definition set | SET_XX |
| ID | N## |
| Short text | Normal Group ## |
| PS grouping | 01 |
| DWS grouping | 01 |
| Substitution type | 02 (shift substitution) |
| Daily WS | TZ## |

Save your entries and go back to the *Change View "Define Time Data IDs": Overview* screen.

2. For the time data IDs you created, determine how they are to be used within the subsets of the definition set *SET_XX*. Check whether the subsets *001* and *002* are already available in the definition set *SET_XX*.
 - a) To check whether subsets *001* and *002* are available for the definition set *SET_XX*, in Customizing, choose *Time Management* → *Time Manager's Workplace* → *IDs for Time Data* → *Define Subsets and IDs*.
 - b) In the *Choose Activity* dialog box, choose *Create Subsets for Time Data IDs*. Subsets *001* and *002* should be available in the following view for definition set *SET_XX*.
3. Define the use of time data IDs for subset *002* in the definition set *SET_XX* so that time administrators can record time data using these time data IDs. To do so, indicate that the newly created time data IDs are to be the *default IDs* for subset *002*.
 - a) Go back to the *Choose Activity* dialog box, and choose *Specify Use of IDs for a Subset* to determine how the time data IDs you created for subset *002* in the definition set *SET_XX* are used.
 - b) Enter **SET_XX** in the *Definition set* field and **002** in the *Definition subset* field and choose *Continue*.
 - c) On the *Change View Use of IDs in a Subset: Overview* screen, select the *Default ID* indicator for the time data IDs *L##* and *N##* you created.

Note the difference between the indicators for *default IDs* and *input IDs*. All the time data IDs you created must be assigned as default time data IDs, because each of the IDs is only valid for one subtype of the corresponding infotype. If more than one

subtype of an infotype were to be represented by a time data ID, then one of the subtypes would have to have the indicator *Default ID* and the other the indicator *Input ID*.

- d) Save your entries.
4. Define colors for the calendar view for your own time data IDs, *L##* and *N##*, in the *SET_XX* definition set. Choose the colors of your choice.
 - a) In Customizing, choose *Time Management* → *Time Manager's Workplace* → *IDs for Time Data* → *Define Colors of Time Data IDs*.
 - b) In the *Determine Work Area: Entry* dialog box, enter *SET_XX* in the *Definition set* field and choose *Continue*.
On the *Change View Set Colors of Time Data IDs for Calendar View: Overview* screen, choose the *New Entries* pushbutton.
On the *New Entries: Overview of Added Entries* screen, add your time data IDs, *L##* and *N##* to the list and select a color of your choice for each; for example, red for *L##* and green for *N##*.
Save your entries.
 - c) Check that your settings were made correctly by exiting and re-entering the TMW. On the *Change View Set Colors of Time Data IDs for Calendar View: Overview* screen, from the main menu bar choose *System* → *Create Session*.
On the SAP Easy Access screen, choose: *Human Resources* → *Time Management* → *Administration* → *Time Manager's Workplace*.
From the main menu bar, choose *Settings* → *Choose IDs*.
In the *Change Subset IDs* dialog box, enter *002* in the *Subset* field and choose *Continue*.
Choose the *Calendar* tab page and review the colors assigned to your time data IDs *L##* and *N##*.
Go back to the SAP Easy Access screen.

Unit 8

Exercise 28

Create TMW Profiles

Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each time administrator.

Now that you have created suitable time data IDs to record time data, the next step is to create profiles.

Create a profile and modify the initial period and the person selection period for your profile. Access the *Time Manager's Workplace* again and test your configuration changes.

1. Copy profile `Z_HR306_TIME_ADMIN` to profile `Z_##_TIME_AD` (## = group number).
2. Modify the initial period and the person selection period.
The initial period comprises four weeks: the previous week, the current week, and the next two weeks. The first day of the week is a Monday. The person selection period comprises one month before and one month after the initial period.
3. Make sure that time administrators to whom this profile is assigned are only able to access the applicable subset of IDs for this definition set.
4. In your user parameters, store the following values for the *Time Manager's Workplace*:

| Field | Value |
|-----------------------|--------------------|
| <i>Definition set</i> | SET_xx |
| <i>ID Subset</i> | 002 |
| <i>Profile</i> | z##_TIME_AD |

Create TMW Profiles

Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each time administrator.

Now that you have created suitable time data IDs to record time data, the next step is to create profiles.

Create a profile and modify the initial period and the person selection period for your profile. Access the *Time Manager's Workplace* again and test your configuration changes.

1. Copy profile Z_HR306_TIME_ADMIN to profile Z_##_TIME_AD (## = group number).
 - a) In Customizing, choose *Time Management* → *Time Manager's Workplace* → *Menu Design* → *Create Profiles and Assign Field Selections*.
 - b) On the *Change View "Define Profile": Details of Selected Set* screen, choose the profile Z_HR306_TIME_ADMIN and then choose *Edit* → *Copy As* from the main menu.
 - c) On the *Change View "Define Profile": Details of Selected Set* screen, enter **Z_##_TIME_AD** in the *Profile* field, and **Z_##_TIME_AD Time Administrator ##** in the *Description* field.
 - d) Choose *Enter*, and in the *Information* dialog box, choose *Continue* to confirm the number of total profile entries you have copied.
 - e) In the *Change View "Define Profile": Overview* screen, save your entries.

2. Modify the initial period and the person selection period.

The initial period comprises four weeks: the previous week, the current week, and the next two weeks. The first day of the week is a Monday. The person selection period comprises one month before and one month after the initial period.

- a) On the *Change View "Define Profile": Overview* screen, select the profile Z_##_TIME_AD and choose *Goto* → *Details* from the main menu bar.
- b) In the *Initial Period* screen area, enter the following data:

| Field | Value |
|--------------------------|---------------------|
| Period | Current week |
| Relative position period | leave blank |
| Direction | leave blank |
| Relative start date | 1 week |
| Relative end date | 2 weeks |

| Field | Value |
|----------------|--------|
| Week beginning | Monday |

- c) In the *Selection period relative to initial period* screen area, enter the following data:

| Field | Value |
|---------------------|---------|
| Relative start date | 1 month |
| Relative end date | 1 month |

- d) Select the *Message Line* in the *Upper Screen Area* check box and save.

3. Make sure that time administrators to whom this profile is assigned are only able to access the applicable subset of IDs for this definition set.

- a) To ensure that time administrators who are assigned the `Z##_TIME_AD` profile can only access their specific subset of IDs for the corresponding definition area, scroll down on the *Further Settings* screen area. Make sure that the *Subset IDs can be changed* indicator is not set.

- b) Save your entries.

4. In your user parameters, store the following values for the *Time Manager's Workplace*:

| Field | Value |
|----------------|--------------------------|
| Definition set | <code>SET_XX</code> |
| ID Subset | 002 |
| Profile | <code>z##_TIME_AD</code> |

- a) In the main menu on the *SAP Easy Access* screen, choose *System → User Profile → Own Data*.

- b) On the *Maintain User Profile* screen, choose the *Parameters* tab page and enter the following data:

| Set/Get parameter ID | Parameter value |
|-----------------------------|--------------------------|
| <code>PT_TMW_PROFILE</code> | <code>z##_TIME_AD</code> |
| <code>PT_TMW_TDLANGU</code> | <code>SET_XX/002</code> |

- c) Save your entries and return to the *SAP Easy Access* screen.

- d) To access the *Time Manager's Workplace*, choose *Human Resources → Time Management → Administration → Time Manager's Workplace*.

- e) Review your Customizing changes.

Unit 8

Exercise 29

Create Employee Selections in TMW

Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each time administrator. You must set up a user-specific selection to enable time administrators to complete time activities for employees in their specific personnel subarea.

Check the user-independent selection stored in your profile *Z_##_TIME_AD* (## = your group number) and create a user-specific selection to select all employees in the personnel subarea *TP##*.

1. Check the user-independent standard selection stored in your profile *Z_##_TIME_AD*.
2. Which selection IDs are assigned?
3. Review the selection IDs assigned to the group view for your profile.
4. Create the selection ID *Z_##* to select all employees in the personnel subarea *TP##*.
5. Assign selection ID *Z_##* to the group *Z_USER_HR306* for your own user, *HR306-##*.
6. Assign the new user-specific selection to your profile.

Create Employee Selections in TMW

Business Example

A variety of tasks are performed by time administrators in your company. By using different profiles, you can set up the TMW to meet the requirements of each time administrator. You must set up a user-specific selection to enable time administrators to complete time activities for employees in their specific personnel subarea.

Check the user-independent selection stored in your profile `Z_##_TIME_AD` (## = your group number) and create a user-specific selection to select all employees in the personnel subarea `TP##`.

1. Check the user-independent standard selection stored in your profile `Z_##_TIME_AD`.
 - a) In Customizing, choose *Time Management* → *Time Manager's Workplace* → *Employee Selection* → *Assign Employee Selection to Profiles*.
 - b) On the *Change View Time Manager's Workplace Profile Settings: Overview* screen, choose your profile `Z_##_TIME_AD` and then choose the *Details* pushbutton.
2. Which selection IDs are assigned?
 - a) On the *Settings* tab page, scroll to the *Employee Selection* screen area. In the *Standard Selection Using Selection Criteria* screen area, enter `Z_USER_HR306` in the *User-specific selections according to group* field.



Note:

`Z_TMW_306` should already be assigned as the multiple-user selection according to group. This was part of your profile copy.

- b) Choose the *Enter* pushbutton and save your entries.
 - c) To check which selection IDs are assigned to this group, in Customizing, choose *Time Management* → *Time Manager's Workplace* → *Employee Selection* → *Define Groupings*.
3. Review the selection IDs assigned to the group view for your profile.
 - a) On the *Change View "Groups": Overview* screen, choose the `Z_TMW_HR306` group and then double-click the *Grouping* option in the *Dialog Structure* to the left of the screen.
 - b) Verify that the following selection IDs are already assigned:

| Group | User | Seq. no. | Sel.ID |
|--------------------------|------|----------|----------------------------|
| <code>Z_TMW_HR306</code> | | 001 | <code>Z_HR306_PERNR</code> |

| Group | User | Seq. no. | Sel.ID |
|-------------|------|----------|---------------------|
| Z_TMW_HR306 | | 002 | Z_HR306_TMW_TIME_AD |

The selection ID *Z_HR306_PERNR* was created specifically for the HR306 course. Personnel numbers from 30699400 - 30699404 are included in the selection.

- *Z_HR306_TMW_TIME_AD*:

Selection ID *TMW_TIME_ADMIN* is included in the standard system. It is used to select all the employees who are assigned to an administrator by means of the administrator ID in the *Time* field of the *Organizational Assignment* infotype (0001).

4. Create the selection ID *Z_##* to select all employees in the personnel subarea *TP##*.
 - In Customizing, choose *Time Management* → *Time Manager's Workplace* → *Employee Selection* → *Define Selection IDs*.
 - On the *Change View "Selections"*: Overview screen, choose the *New Entries* pushbutton.
 - On the *New Entries: Overview of Added Entries* screen, enter the following data:

| Selection ID | Selection text |
|--------------|--|
| <i>z_##</i> | <i>Selection by personnel subarea TP##</i> |

- Choose the *Enter* pushbutton to confirm your entries and then save your data.
- Select your new entry and double-click the *Table* option from the *Dialog Structure* in the screen area to the left.
- On the *Change View Table: Overview* screen, choose the *New entries* pushbutton and enter the following data:

| Sel.ID | Seq. no. | Seq. no. | Obj.class | Infotype | Field name | Field type |
|-------------|----------|----------|-----------|----------|------------|----------------|
| <i>z_##</i> | 1 | 1 | Persons | 0001 | BTRTL | Infotype field |

No entries are required in the other remaining fields.

- Save your entries.
- On the *New Entries: Overview of Added Entries* screen, choose your new entry and double-click the *Ranges* option from the *Dialog Structure* in the left screen area.
- Choose the *New Entries* pushbutton and enter the following data:

| Selection ID | No. | No. | No. | INCL/EXCL | Option | Selection value |
|--------------|-----|-----|-----|-----------|--------|-----------------|
| <i>z_##</i> | 1 | 1 | 1 | I | EQ | <i>TP##</i> |

No entries are required in the other remaining fields.

- j) Save your entries and return to the main Customizing screen.
5. Assign selection ID Z_## to the group Z_USER_HR306 for your own user, HR306-##.
- In Customizing, choose *Time Management* → *Time Manager's Workplace* → *Employee Selection* → *Define Groupings*.
 - On the *Change View Groups: Overview* screen, choose group Z_USER_HR306, and then choose the *Grouping* option in the left screen area in the *Dialog Structure*.
 - On the *Change View Grouping: Overview* screen, choose the *New Entries* pushbutton and enter the following data:
- | Group | User | Seq. no. | Sel.ID |
|--------------|----------|------------------|--------|
| Z_USER_HR306 | HR306-## | enter any number | z_## |
- Save your entries and return to the main Customizing screen.
6. Assign the new user-specific selection to your profile.
- In Customizing, choose *Time Management* → *Time Manager's Workplace* → *Employee Selection* → *Assign Employee Selection to Profiles*.
 - On the *Change View Time Manager's Workplace: Profile Settings Overview* screen, choose your profile Z##_TIME_AD and then choose the *Details* pushbutton.
 - The *Change View Time Manager's Workplace: Profile Settings: Details* screen is displayed. In the *Employee Selection* screen area, enter the following data in the *Standard selection using selection criteria* screen area:
User-specific selections according to group: Z_USER_HR306.
 - Save your entries and return to the main Customizing screen.

Unit 9

Exercise 30

Hire an Employee

Business Example

You need to hire a new employee using the CATS Mini-Master and include timesheet defaults. Later you will use this employee to test entries in CATS.

Hire an employee with the personnel number 306996## starting on the first day of the current year. The employee is part of the Active employee group and the Salaried employee subgroup. Assign the employee to the position of ##-Production Worker in the organizational unit Central Production for your group.

You are free to choose the name and other personal data. The employee works according to the work schedule rule NORM. For the default values for the timesheet, select *Required to record times in timesheet*.

1. Use the personnel action *CATS (Mini master)* to hire the employee.
2. Enter Working Time without Required Approval

Unit 9

Solution 30

Hire an Employee

Business Example

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You are free to choose the name and other personal data. The employee works according to the work schedule rule NORM. For the default values for the timesheet, select *Required to record times in timesheet*.

1. Use the personnel action *CATS (Mini master)* to hire the employee.
 - a) From the SAP Easy Access screen, choose *Human Resources* → *Personnel Management* → *Administration* → *HR Master Data* → *Personnel Actions*.
 - b) Select the (ZC) *CATS (Mini master)* action.
 - c) In the *Pers. no.* field, enter personnel number **306996##**. In the *From* field, enter the **first day of the current year** and choose *Execute*.
 - d) In the *Position* field, enter **##-Production Worker**.



Hint:

Use the structure search in the possible entries help to find the position. Choose Org Units Training Group -> Training International -> Warehouse and Production -> Central Production -> ##-Production Worker. Select the position by double-clicking on it.-> Warehouse and Production -> Central Production -> ##-Production Worker. Select the position by double-clicking it.

- e) In the *Personnel area* field, enter the personnel area **CABB**. In the *Employee group* and *Employee subgroup* fields, enter **Active (1)** and **Salaried employee (X0)** respectively. Save your data.
- f) In the *Personal Data* infotype (0002), enter a **name and date of birth of your choice**. Save the data.
- g) In the *Organizational Assignment* infotype (IT0001), enter the *Personnel subarea* **0005 Production** in the *Personnel subarea* field. Save the data.
- h) In the *Planned Working Time* infotype (IT0007), enter the *Work schedule rule* **NORM**. Save the data.

- i) In the *Time Sheet Defaults* infotype (IT0315), accept the default Sender cost center, and assign **1000 Hamburg** as the *Plant*. Save the data.
2. Enter Working Time without Required Approval
- a) From the SAP Easy Access screen, choose *Human Resources* → *Time Management* -> *Time Sheet* -> *CATS Classic* -> *CAT2 - Record Working Times*.
 - b) Enter **ESS##** in the *Data Entry Profile* field and choose *Enter Times*.
 - c) Use the *previous screen arrow* to move back to the prior week.
 - d) Choose *Target Hours*. Select Yes in the dialog box asking if a new line should be entered. Note: Attendance type 0800 has been set up as the default for your timesheet and should be proposed.
 - e) On the next line, choose *Attendance type 0801* and enter **2 hours** for one of the working days.
 - f) Choose *Save* and agree to any warnings about overlapping records for your overtime entry.
Note: Since profile ESS## currently requires no approval and times are released when saved, your employee should now have time entries for the prior week on IT2002.
 - g) To view the Attendances, enter **/OPA30** in the *Command* field and press *Enter*.
 - h) Verify your employee **306996##** is in the *Personnel No.* field.
 - i) Enter **2002** in the *Infotype* field, select the *All* radio button and then choose *Overview*.

Unit 9

Exercise 31

Set Up a Data Entry Profile

Business Example

Since your company will use CATS profiles to enter employee time data for Human Resources, you must understand how to configure them.

Set up a Data Entry Profile

Set up a data entry profile **##1CATS** for entering time data for Human Resources. Your profile should include these characteristics:

| |
|--|
| • You want to record working time weekly for individual employees. |
| • You want the days to be displayed as dates. You want to be able to enter data for every day. |
| • You also want to release data recorded for days that lie in the future. You want the data to be approved in a separate step. The data can still be changed after approval. |
| • You want rejected hours and any hours for which additional data has been entered to be highlighted. |
| • You want the hours from the employee's work schedule to be displayed. You want the total hours per day to be displayed. |
| • You want the current week to be displayed as default. You want to be able to scroll four weeks backwards and six weeks forwards to change the data entry period. |
| • You want to use default values (controlling area, cost center, and activity type) from the Timesheet Defaults infotype (IT0315). In addition, you want the attendance 0800 Attendance hours to be proposed as the default value. |
| • You want personnel costs to be assigned to the master cost center. |
| • You want error messages to be displayed if there are collisions between CATS records or between CATS records and HR records, if quotas are exceeded, or if more than 24 hours are entered per day. |
| • You want a warning to be issued if the recorded hours exceed the target hours by more than 25%. |
| • You want hours entered directly in HR Time Management and overtime hours to be taken into account. |

1. Set up the data entry profile **##1CATS**.
2. Select Profile Fields: Select the fields you want to appear in the data entry section for profile CATS##1. This profile is used to enter time data that is transferred as attendances to Human Resources and as confirmations for networks to the Project System.
3. You require the *Activity type*, *Attendance/Absence type*, *Name employee/applicant (CATSFIELDS-ENAME)*, *Personnel number*, and *Sender cost center* fields.

4. Test Your New Profile.

- Note: Since profile ##1CATS currently requires no approval and times are released when saved, your employee should now have new time records for the week you just recorded.

5. View the new attendances.

Unit 9

Solution 31

Set Up a Data Entry Profile

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| • You want the hours from the employee's work schedule to be displayed. You want the total hours per day to be displayed. |
| • You want the current week to be displayed as default. You want to be able to scroll four weeks backwards and six weeks forwards to change the data entry period. |
| • You want to use default values (controlling area, cost center, and activity type) from the Timesheet Defaults infotype (IT0315). In addition, you want the attendance 0800 Attendance hours to be proposed as the default value. |
| • You want personnel costs to be assigned to the master cost center. |
| • You want error messages to be displayed if there are collisions between CATS records or between CATS records and HR records, if quotas are exceeded, or if more than 24 hours are entered per day. |
| • You want a warning to be issued if the recorded hours exceed the target hours by more than 25%. |
| • You want hours entered directly in HR Time Management and overtime hours to be taken into account. |

1. Set up the data entry profile **##1CATS**.
 - a) Use transaction code **SPRO** to access the SAP Reference **IMG**. Choose **Cross-Application Components → Time Sheet → Specific Settings for CATS classic → Set Up Data Entry Profiles**.
 - b) Choose **New entries**. On the next screen, enter the name **##1CATS** and a short description, for example **HR (Group ##)**, in the relevant fields.

- c) In the *General Settings* section, select the following options:

With target hours

With totals line

Highlight rej. recs

Highlight addnl info

Release future times

Release on Saving

- d) In the *Time Settings* section, enter the following values:

| | |
|------------------------------|------------------------------|
| <i>Period type:</i> | 2 (Weekly data entry) |
| <i>Periods:</i> | 1 |
| <i>Start date relative:</i> | - blank - |
| <i>Upper limit relative:</i> | 4 |
| <i>Upper limit relative:</i> | 6 |

- e) In the *Person selection* section, do not change any of the options.

- f) In the *Approval Section*, accept the proposed without approval procedure and select the box *Immediate Transfer to HR*.

- g) In the *Cost accounting variant* section, select the first option *Assignment of personnel costs to master cost center*.

- h) In the *Default Values* section, select the following options:

Controlling area

Cost center activity type

Attendance/absence type

In the *Att./absence type* field, enter the attendance type 0800 (Attendance hours).

- i) In the *Data entry checks: General* section, select the following options:

| | |
|--------------------------------|------------------------|
| <i>Collision:</i> | <i>Warning message</i> |
| <i>More than 24 hours:</i> | <i>Warning message</i> |
| <i>Time type target hours:</i> | <i>Blank</i> |
| <i>Sub. HR hours:</i> | <i>Select</i> |
| <i>Add overtime:</i> | <i>Select</i> |
| <i>Downward tolerance:</i> | <i>Blank</i> |
| <i>Reaction below tol.:</i> | <i>No message</i> |
| <i>Upward tolerance:</i> | <i>20 %</i> |
| <i>Reaction above tol.:</i> | <i>Warning</i> |

- j) In the *Data entry checks: For users of HR* section, select the following options:

| | |
|--------------------|-----------------|
| Quotas: | Warning message |
| Collision with HR: | Warning message |

- k) For an ESS profile, in the *Time Recording Settings for ESS (WDA)* section, choose HR Enabled CATS.



Note:

If you use the same Absence Type for all public holidays, it can be entered in the Public Holiday Type field. It will then show up in this timesheet profile on each public holiday.

- I) Save the profile.
2. Select Profile Fields: Select the fields you want to appear in the data entry section for profile CATS##1. This profile is used to enter time data that is transferred as attendances to Human Resources and as confirmations for networks to the Project System.
- a) In *Customizing*, choose *Cross-Application Components* → *Time Sheet* → *Settings for All User Interfaces* → *Time Recording* → *Choose Fields*.
 - b) Select *Data entry* section, choose *Influencing*, and enter the profile name **##1CATS**.
Note: Choose *Enter* once you have entered the profile name.
3. You require the *Activity type*, *Attendance/Absence type*, *Name employee/applicant (CATSFIELDS-ENAME)*, *Personnel number*, and *Sender cost center* fields.
- a) Hide all the fields except for *Activity type*, *Attendance/Absence type*, *Name employee/applicant (CATSFIELDS-ENAME}*, *Personnel number*, and *Sender cost center*. To do this, select the *Input* column for the fields you require, and the *Hide* column for all other fields.
Hint: You may wish to start with all fields hidden and then choose the ones needed for input.
It is also possible to create a CAT template with a basic profile and all fields hidden. Then, as new profiles are needed, you can copy the template to a new and tweak as necessary.
 - b) Save the data.
4. Test Your New Profile.
- a) From the SAP Easy Access screen, choose *Human Resources* → *Time Management* -> *Time Sheet* -> *CATS Classic* -> *CAT2 - Record Working Times*.
 - b) Enter **##1CATS** in the *Data Entry Profile* field and choose *Enter Times*.
 - c) Use the *previous screen arrow* to move back and forward. You should not be able to move back more than 6 weeks or forward more than 4 weeks. After testing this, move back to the first week where you have no entries.
 - d) Choose *Target Hours*. Select Yes in the *dialog* box asking if a new line should be entered. Note: Attendance type 0800 has been set up as the default for your timesheet and should be proposed.
 - e) Choose *Save* and agree to any warnings should they appear.

- Note: Since profile ##1CATS currently requires no approval and times are released when saved, your employee should now have new time records for the week you just recorded.
5. View the new attendances.
- a) To view the new Attendances, enter /OPA30 in the *Command* field and press *Enter*.
 - b) Verify your employee 306996## is in the *Personnel No.* field.
 - c) Enter **2002** in the *Infotype* field, select the *All* radio button and then choose *Overview*.

Unit 9

Exercise 32

Configure the Approval Procedure

Business Example

Most timesheet records contain confidential data relating to the employees' payment or to the progress of a project, for example. You can therefore have line managers, project leads, or others in your company check and approve recorded working times before you transfer the data to the target components. For your employee only, your new absence type for special leave and overtime need to be approved.

1. Define a rejection reason and special approval rule.
Create rejection reason ZR## Unauthorized Time.
2. Create rule ##RULE for special approval.
3. Maintain the feature CATEX to meet your requirements.
4. Assign rules to the rule group.
5. Assign your rule to the data entry profile ##1CATS.
6. Assign your profile ##1CATS as the default for user HR255.e-##.

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1. Define a rejection reason and special approval rule.
Create rejection reason ZR## Unauthorized Time.
 - a) In *Customizing for Cross-Application Components*, choose *Time Sheet > Settings for All User Interfaces > Approval Procedure > Define Rejection Reasons*.
 - b) On the *Change View "CATS: Rejection Reasons"*: Overview screen, choose the *New Entries* pushbutton and enter **ZR##** in the *Reason* field.
 - c) Enter the text **Unauthorized Time ZR##** in the *Text* column.
 - d) Save your entries and return to *Customizing*.
2. Create rule ##RULE for special approval.
 - a) In *Customizing for Cross-Application Components*, choose *Time Sheet > Settings for All User Interfaces > Approval Procedure > Special Approval > Define Rules for Special Approval*.
 - b) On the *Change View "Rules for Special Approval"*: Overview screen, choose the *New Entries* pushbutton.
 - c) Enter **##RULE** in the *Rule* field.
 - d) Enter the text **Leave with App Req.** in the *Description* column.
 - e) Save your entries.
3. Maintain the feature CATEX to meet your requirements.
 - a) In *Customizing for Cross-Application Components*, choose *Time Sheet > Settings for All User Interfaces > Approval Procedure > Special Approval > Formulate Rules for Special Approval*.

**Note:**

Your instructor will edit the feature for each student since only one person at a time can maintain and activate the feature.

If the instructor directs the students to edit the feature, only open the feature once another group has finished and the instructor has instructed you to do so. Otherwise, you will overwrite the settings of other participants.

- b)** On the *Process feature CATEX: decision tree* screen, place your cursor on the *RULE_ID* node and choose the *Create Nodes* pushbutton.
 - c)** In the dialog box, select the checkbox for *##RULE* and choose the *Copy* pushbutton.
 - d)** Place your cursor on the *##RULE* node and choose the *Create Nodes* pushbutton.
 - e)** In the dialog box, select the *Field for Decision Operation* radio button and then choose the *Continue* pushbutton.
 - f)** Select *A WART* and then choose the *Transfer* pushbutton.
 - g)** Place your cursor on *A WART* and choose the *Create Nodes* pushbutton.
 - h)** In the dialog box, select your new absence type *LE##* and then the *Copy* pushbutton.
 - i)** Select absence type *LE##* and then choose the *Create Nodes* pushbutton.
 - j)** Select *Return Value* and then choose the *Continue* pushbutton.
 - k)** Select *Approval Required*.
 - l)** Activate the feature by choosing the *Activate* icon.
 - m)** Once the feature has been activated (you receive a Feature was Generated message), exit the feature to allow the next group to complete their updates.
 - n)** Return to *Customizing*.
- 4.** Assign rules to the rule group.
- a)** In *Customizing for Cross-Application Components*, choose *Time Sheet > Settings for All User Interfaces > Approval Procedure > Special Approval > Specify Rule Groups for Special Approval*.
 - b)** On the *Change View "Define Rule Groups": Overview* screen, choose the *New Entries* pushbutton.
 - c)** In the *Group* field, enter **##RUGR** and enter the description **Leave/OT Group ##**.
 - d)** Choose your rule group and in the *Dialog Structure*, choose *Link to Rule*.
 - e)** On the *Change View "Link to Rule": Overview* screen, choose the *New Entries* pushbutton.
 - f)** In the *Rule* field, open the input help (F4) and choose your new rule *##RULE* from the list. Also add rule *OVERT*.
 - g)** Save your entries.

5. Assign your rule to the data entry profile ##1CATS.
 - a) In *Customizing for Cross-Application Components*, choose: Time Sheet > Settings for all User Interfaces > Approval Procedure > Special Approval > Assign Rule Groups to Data Entry Profile.
 - b) On the *Change View CATS: Data Entry Profiles Details* screen, choose your data entry profile ##1CATS and choose the *Details* pushbutton.
 - c) In the approval area, select the *With approval procedure for exceptions* radio button.
 - d) In the *Group* field, open the input help (F4), and select your rule group. Keep *Immediate transfer to HR* selected.
 - e) Save your entries.
6. Assign your profile ##1CATS as the default for user HR255.e-##.
 - a) Use transaction code SU01 and enter **HR255.e-##** in the *User* field.
 - b) Choose *Change* and select the *parameters tab*.
 - c) Locate parameter CVR and replace any entry with **##1CATS**.
 - d) Save your entries.

Unit 9

Exercise 33

Test Configuration of the Approval Procedure

Business Example

Employees in your company are required to enter time data. Some entries such leave an overtime need to be approved while others do not. You want to enter time for employee 255014## in NWBC.

- Enter the following times:
 - Mon: Attendance type **0800 for 8 hours** and **0801 for 2 hours**.
 - Tues: Absence type **0200 for 8 hours**.
 - Wed: Attendance type **0800 for 8 hours**.
1. : Enter time data for employee 255014## in NWBC.
 2. Approve/reject time entries.

Test Configuration of the Approval Procedure

Business Example

Employees in your company are required to enter time data. Some entries such leave an overtime need to be approved while others do not. You want to enter time for employee 255014## in NWBC.

- Enter the following times:
 - Mon: Attendance type **0800 for 8 hours** and **0801 for 2 hours**.
 - Tues: Absence type **0200 for 8 hours**.
 - Wed: Attendance type **0800 for 8 hours**.
1. : Enter time data for employee 255014## in NWBC.
 - a) Log into SAP, Client **800** and language **EN** with user **HR255.e-##** and password **hr255-##**.
 - b) Enter transaction code **NWBC** in the *Command* field and press *Enter*.
 - c) Choose the role **SAP_EMPLOYEE_ESS_WDA_1**.
 - d) From the *NWBC homepage*, under *TTime recording*, choose *Record Working Times*.
 - e) For the current week, enter the following data:
 - Mon: Attendance type **0800 for 8 hours** and **0801 for 2 hours**.
 - Tues: Absence type **0200 for 8 hours**.
 - Wed: Attendance type **0800 for 8 hours**.
 - f) Save your entries.
 - g) Return to the SAP Easy Access screen.
 2. Approve/reject time entries.
 - a) From the SAP Easy Access screen, choose: *Human Resources -> Time Management -> Time Sheet -> Approval -> Approve Working Times*.
 - b) Enter **255014##** in the *personnel number* field and choose *Execute*. Note: Only Attendance type 0800 and Absence type LE## should appear in the list. Attendance type 0800 did not require approval.
 - c) Select *Attendance type 0801* and choose *Reject*. Select your rejection reason ZR## from the list of reason codes.
 - d) Select *Absence type LE##* and choose *Approve*.

- e) Access transaction code PA30 and view records for IT2001 and IT2002. Verify that the overtime record has not been created and that the absence record has.
- f) Enter transaction code PA30 in the *Command* field and press *Enter*.
- g) If needed enter *personnel number 255014##* and **2001** in the *infotype* field. Then select the *All* radio button and the *Overview* icon.
- h) Repeat these steps to confirm that Attendance type 0800 records exist, but no record for 0801 does.
 - i) After viewing, return to the SAP Easy Access screen.
 - j) View time entries in PA30. Choose *All Employees* from the *Select employee data list*. A dialog box opens.
 - k) Choose Yes and save the entries to approve the time data.

Unit 10

Exercise 34

Configure Time Data for an Employee

1. Case Study: Part 1: Generate Work Schedules for a 9X80 Shift

Business Example

As the Time Administrator, you are responsible for the maintenance of work schedules. You want to generate a work schedule for a 9X80 shift and assign it to your employees. For this reason, you need to know how to set up and assign these work schedules.

Create new Work Schedule Rules to use for employees who work 80 hours in 9 working days over a biweekly period. This is often referred to as a 9X80 schedule. The first week employees will work four 9 hour days Monday through Thursday and 8 hours on Friday.

The second week they will work four 9 hour days and have Friday off. They have a planned fixed break of 1 hour each work day. They do not work on Saturday and Sunday. Use the DWS class to differentiate between the three DWS.

Create two Work Schedule Rules from your Period Work Schedule as some employees will be assigned to week 1 and others will be assigned to week 2 at all times.



Note:

Employees assigned to this Work Schedule rule are required to work (when scheduled) on holidays.

If the system prompts you for a country grouping, choose 99 Other Countries.

Work Schedule Rule Groupings:

- Employee Subgroup Grouping: 1
- Personnel Subarea Grouping: 01

Naming Conventions:

- ##B1 Breaks (use ##B2, ##B3, as necessary)
- ##D8 DWS 8 Hour Day
- ##D9 DWS 9 Hour Day
- ##OF DWS Off
- ##98 Period Work Schedule
- ##9x80_1 Work Schedule Rule 1
- ##9x80_2 Work Schedule Rule 2

2. Create a break schedule called ##B1 with a one hour fixed unpaid break from 12:00 to 13:00. Use the grouping for daily work schedules 01

3. Define the daily work schedules ##D8 ## 8 Hours , ##D9 ## 9 Hours , and ##OF ## Off by using the daily work schedules H8, H9, and OFF, respectively. Note: These DWS are assigned to PSA Grouping 10 – be sure to assign the grouping for daily work schedules 01. Assign the break schedule ##B1 you previously created to the daily work schedules. The details of the daily work schedules are as follows:
 - For the daily work schedule ##D8 ## 8 Hours , work starts at 08:00, with a planned working time of 8 hours.
 - For the daily work schedule ##D9 ## 9 Hours , work starts at 8:00, with a planned working time of 9 hours (industry hours).
 - For the daily work schedule ##OF ## Off , select no planned hours and planned working time of 0 hours.
4. Create a period work schedule ##98. Group the daily work schedules ##D8 , ##D9 and ##OF into one period work schedule called ##98 . The work pattern repeats itself every two weeks. You can copy two weeks of an existing period work schedule. Choose the grouping for daily work schedules 01. Week 2 should indicate the last 3 days of the week as ##OF.
5. Check selection rule for day types. Your employees are required to work on public holidays. Check the selection rule 02. This rule will be referenced later in the work schedule rule. 02. This rule will be referenced later in the work schedule rule.
6. Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your hourly wage earners. Check the public holiday calendar assigned to the personnel subarea TP## Production Dept.
7. Define two work schedule rules ##9x80_1 and ##9x80_2 . From ESG Grouping 1, Holiday Calendar US and PSA Grouping 10, copy the work schedule rules 9X80 and 9X80_2 . For your copy, use the employee subgroup grouping Industrial Workers and the public holiday calendar assigned to your personnel subarea TP##, as well as the personnel subarea grouping for work schedules. Use the rule for day types 02. Use your period work schedule ##98.
8. Generate work schedules ##9x80_1 and ##9x80_2 (## 9 Days / 80 Hours 1 and ## 9 Days / 80 Hours 2) for a period of three years.
9. Assign work schedule rule ##9x80_1 to your hourly-wage earner in the Planned Working Time infotype, starting the first of this month.

Case Study: Part 2: Hire a New Employee

Business Example

In your role as Time Administrator, you have created a new work schedule rule. You want to hire an employee to the test assignment of your new 9x80 work schedule rule. Hire a new employee as of 01/01/YYYY. Use the Time Recording Mini Master Personnel Action. Assign personnel number 306995##. Assign your new Work Schedule rule on IT0007.

| Infotype | Field | Value |
|---------------|------------------|------------|
| Hiring Action | Personnel Number | 306995## |
| Hiring Action | From | 01/01/YYYY |
| 0000 | Personnel Area | CABB |

| Infotype | Field | Value |
|----------|---|----------------------------|
| 0000 | EE Group | 1 |
| 0000 | EE Subgroup | XI (xi) |
| 0002 | Last name | Your choice |
| 0002 | First name | Your choice |
| 0002 | Date of Birth | Your choice |
| 0001 | Personnel Subarea | 0001 |
| 0001 | Payroll Area (confirm and save) | XO (monthly) |
| 0001 | Position (no position; enter at dialog box) | Continue |
| 0007 | WS Rule | ##9X80_1 |
| 0007 | TM Status | 9 |
| 0050 | -- | if presented, chose cancel |

- Run hiring action WNATE Time Rec (Mini-Master) for employee 306995##.

| Infotype | Field | Value |
|---------------|---|-----------------------------|
| Hiring Action | Personnel Number | 306995## |
| Hiring Action | From | 01/01/YYYY |
| 0000 | Personnel Area | CABB |
| 0000 | EE Group | 1 |
| 0000 | EE Subgroup | XI (xi) |
| 0002 | Last Name | Your Choice |
| 0002 | First Name | Your Choice |
| 0002 | Date of Birth | Your Choice |
| 0001 | Personnel Subarea | 0001 |
| 0001 | Payroll Area (confirm and save) | XO (monthly) |
| 0001 | Position (no position: enter at dialog box) | Continue |
| 0007 | WS Rule | ##9X80_1 |
| 0007 | TM Status | 9 |
| 0050 | -- | If presented, choose Cancel |

Case Study: Part 3: Set Up an Absence Type

Business Example

As the Time Administrator, you are responsible for the setup of absence types. You have received a request to create a new absence type and will copy and modify one of the samples provided in the standard SAP system. Create the absence type ##LE, call it Leave Group ##,

and define the following checks. The maximum duration should be 999 days. The time constraint class should be set up to allow this type of leave to be delimited automatically if it overlaps with a newly created absence record for sick leave.

If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message.

If the entire period is a non-working period, you want the administrator to receive an error message.



Note:

If the system prompts you for a country grouping, choose Other countries.

1. Check the appropriate groupings.
2. Create the absence type ##LE and call it Leave Group ## . To do so, copy the absence type 0100 (Leave).
3. Define the checks that the system has to perform when an absence is entered. If the start and end of the absence are designated as a non-working period, the administrator must receive a warning message. If the entire period is a non-working period, the administrator must receive an error message. You do not want any restrictions for the maximum duration for the absence type.

Case Study: Part 4: Define Counting Rules

Business Example

Employees call in sick, go on vacation, participate in training courses, or go on business trips. As the Time Administrator, you must record attendances and absences correctly for your company. You need to create counting rules to determine the payroll days and hours for attendances and absences. For this reason, you need to know how to define counting rules. Define a counting rule to determine the payroll days and hours for absences.

Create a new Counting Rule 1## and assign it to absence type ##LE. Quota should be deducted on working days even if they fall on a holiday. Incorporate the Daily Work Schedule Class and Counting Class for Period Work Schedule.

Use Quota Groupings:

- Employee Subgroup Grouping 2
- Personnel Subarea Grouping: 01

1. Define a counting class for the period work schedule that you created. You must make an entry for your period work schedule in the applicable Customizing view, because the counting class of a period work schedule is queried in the counting rules.
2. Define a counting rule with to be used for your absence type ##LE . Your personnel subarea TP## must be assigned to the personnel subarea grouping for time quotas. The applicable employee subgroups must be assigned to the employee subgroup grouping for time quotas 2. For these groupings, create counting rule 1## and name it Counting rule group ##.
3. Define a counting rule 1## with subrule 001. Apply the following specifications to subrule 001:

- The absence type is to be counted on all seven days of the week.
 - Since your new work schedule rule will require assigned employees to work if they are scheduled even on holidays, select every holiday class.
 - The absence is counted only if the day is a work day according to the work schedule.
 - For sequence 001, counting occurs on for period work schedules assigned to valuation class 9 and daily work schedule classes 8 and 9 (these should be the DWS classes assigned to your 8 and 9 hour days respectively).
 - The rule applies only to days with planned hours greater than zero and to days that have full day and partial day absences.
 - Hours and days are to be counted as whole amounts (100%) and are rounded to the next whole number. Choose and assign a suitable rounding rule.
 - Absence hours and days are to be multiplied first by the quota multiplier before the values determined for payroll days and hours are rounded.
 - Do not enter any quota deduction rules in the deduction rule section yet.
4. To ensure that the absences of employees are recorded correctly, you need to apply counting rules to absence types. For this reason, you need to know how to assign a counting rule to an absence type. Assign the counting rule 1## (## = your group number) to the absence type ##LE. Check if quota deduction for the absence type ##LE is already activated. Assign a counting rule to an absence type.

Case Study: Part 5 Set Up Quota Types

Business Example

As part of your job, you are responsible for the maintenance of quota types. You need to configure Annual Leave (40+##) with increasing entitlements based on length of service and calculated in hours. You also need to configure Sick Leave (70+##) with a fixed value of 80 hours for all employees. Both quotas will be generated in time evaluation.

Accrue entitlements of different quota types for employees.

1. Set up Quota Types. One is for Annual Leave 40+## and the other is Annual Sick Leave 70+##. Both should be deducted in hours.
2. Designate that your quota will be generated in time evaluation.

Case Study: Part 6 Set Up Quota Entitlements/Selection Rules

Business Example

In your company, quotas have specific entitlements. As the Time Administrator, you need to create a base entitlement rule for Annual Leave 001. This rule should have several sequences. This will be used with the quota type 40+## Leave group ##.

1. Set up Quota Entitlements/Selection Rules for 40+##. Once you have created both quota types, set up appropriate base entitlement rules, validity/deduction intervals, and generation rules for 40+## Annual Leave. Include these in a Quota Selection Rule for your QUOMO grouping 30+##.

Quota Groupings:

- Employee Subgroup Grouping Time Quota: 2
- Personnel Subarea Grouping Time Quota: 01
- Personnel Subarea Grouping Time Recording. 01
- Quota Type Selection Group: 30+##

Hint: Verify the feature QUOMO is currently set up to provide this 30+## return value for all 3 of your employees in TP##.

Quota Types:

- 40+## Annual Leave: Attempt to create base entitlement rules similar to those used by your own company. The total entitlement of annual leave should be reduced for any period of inactivity during the base entitlement period.
- 70+## Sick Leave (80 hours): Employees are entitled to the full entitlement even if they were inactive up to 25% of the base entitlement period.

2. Define base entitlements.
3. Define the validity/deduction interval (40+##). Since both quotas will be generated in time evaluation, it is possible to define separate validity intervals for each. However, in the case study we will use the calendar year for both.
4. Identify existing reduction and rounding rules for quota entitlements (40+##) that will be assigned to your new quota entitlement.
 - In the case of employees who join or leave the company midyear, you want the leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata. You want to round up or down to full hours when determining total entitlements.
 - Use standard reduction rule 03 and standard rounding rule 01. These rules are as follows and will be assigned to your rules in subsequent steps.

| Field | Value |
|----------------|---|
| Reduction Rule | 03 (Reduction rule for inactive hours group ##) |
| Rounding Rule | 01 (Rounding rule to nearest whole number) |

5. Define generation rules for quota selection (40+##). Enter a selection rule with the ID 1## for accruing additional quota 40+##. Name this selection rule Annual leave 40+##. The following specifications are valid for this selection rule:
 - The rule applies to all employees in your personnel subarea, but entitlements differ based on their length of service with the company.
 - The accrual period is one calendar year.
 - You must assign the rule for base entitlement that you created earlier.
 - You must set up a pro rata reduction of quota entitlement for employees leaving or joining the company midyear.

- The total entitlement determined is to be rounded so that only full hours are used.

Case Study: Part 7 Create and Assign Deduction Rules

Business Example

Employees in your company have various quota entitlements. An absence should only reduce one quota. It is possible for employees to have the same quota with varying expiration dates. In this case, the deduction to date is the highest priority. As the Time Administrator, you are responsible for the set up of quota entitlements and related deduction rules. You need to set up and assign deduction rules to ensure quotas are deducted properly.

Create and assign a quota deduction rule.

When your employees take leave using absence type LE, the quota associated with each leave quota type must not be deducted beyond the entitlement.

Set up Quota Entitlements/Selection Rules for 40+##. Once you have created both quota types, set up appropriate base entitlement rules, validity/deduction intervals, and generation rules for 40+## Annual Leave. Include these in a Quota Selection Rule for your QUOMO grouping 30+##.

Quota Groupings:

- Employee Subgroup Grouping Time Quota: 2
- Personnel Subarea Grouping Time Quota: 01
- Personnel Subarea Grouping Time Recording: 01
- Quota Type Selection Group: 30+##

Hint: Verify the feature QUOMO is currently set up to provide this 30+## return value for all 3 of your employees in TP##.

Quota Types:

- 40+## Annual Leave: Attempt to create base entitlement rules similar to those used by your own company. The total entitlement of annual leave should be reduced for any period of inactivity during the base entitlement period.
 - 70+## Sick Leave (80 hours): Employees are entitled to the full entitlement even if they were inactive up to 25% of the base entitlement period.
1. Create a quota deduction rule 1## (where # # = your group number). This rule is used to reduce quota type 40+##. If the employee has quota type 40+## with varying expiration dates then the deduction to dates are the first priority for deduction. Make sure that no deduction from additional quotas is permitted. 1## (where # # = your group number). This rule is used to reduce quota type 40+##. If the employee has quota type 40+## with varying expiration dates then the deduction to dates are the first priority for deduction. Make sure that no deduction from additional quotas is permitted.
 2. Assign your quota deduction rule and then activate and check the quota deduction for absence type ##LE. (# # = your group number) ##LE. (# # = your group number). Assign your quota deduction rule to your counting rule. Where do you make this assignment? Make sure that all above conditions are met when you make the assignment.
 3. Activate and check the quota deduction for ##LE.

Case Study: Part 8 RPTQUOTA_CHECK

Business Example

You have completed the setup of your new work schedule rule. To ensure it is functioning properly, you want to hire an employee to test assignment of your new 9x80 work schedule rule. You will use RPTQUOTA_CHECK to check generation rules for personnel number 306995##.

1. Use RPTQUOTA_CHECK to check generation rules.

**Note:**

If you would like to configure another quota, you can follow these same steps to create Quota Type 70+##. However for this quota you will only have one sequence in your base entitlement rule. All employees are entitled to a constant 80 hours per year. A proportionate deduction rule should be used, but no rounding is applied. After you set up this quota, use RPTQUOTA_CHECK to test your configuration.

Case Study: Part 9 Business Example: Run Time Evaluation to Create Quota Type 40+##

1. Run Time Evaluation to create quota type 40+##.

Case Study: Part 10 Test Your Configuration**Business Example**

You have completed the configuration to time data and now need to test your configuration.

1. Test your configuration.

Configure Time Data for an Employee

1. Case Study: Part 1: Generate Work Schedules for a 9X80 Shift

Business Example

As the Time Administrator, you are responsible for the maintenance of work schedules. You want to generate a work schedule for a 9X80 shift and assign it to your employees. For this reason, you need to know how to set up and assign these work schedules.

Create new Work Schedule Rules to use for employees who work 80 hours in 9 working days over a biweekly period. This is often referred to as a 9X80 schedule. The first week employees will work four 9 hour days Monday through Thursday and 8 hours on Friday.

The second week they will work four 9 hour days and have Friday off. They have a planned fixed break of 1 hour each work day. They do not work on Saturday and Sunday. Use the DWS class to differentiate between the three DWS.

Create two Work Schedule Rules from your Period Work Schedule as some employees will be assigned to week 1 and others will be assigned to week 2 at all times.



Note:

Employees assigned to this Work Schedule rule are required to work (when scheduled) on holidays.

If the system prompts you for a country grouping, choose 99 Other Countries.

Work Schedule Rule Groupings:

- Employee Subgroup Grouping: 1
- Personnel Subarea Grouping: 01

Naming Conventions:

- ##B1 Breaks (use ##B2, ##B3, as necessary)
- ##D8 DWS 8 Hour Day
- ##D9 DWS 9 Hour Day
- ##OF DWS Off
- ##98 Period Work Schedule
- ##9x80_1 Work Schedule Rule 1
- ##9x80_2 Work Schedule Rule 2

- a) In *Customizing*, check if the grouping for work schedules for your personnel subarea TP## Production Dept. is 01. Check if the grouping for daily work schedules for your personnel subarea TP## Production Dept. is 01. In *Customizing*, choose *Time Management > Work Schedules > Personnel Subarea Groupings > Group Personnel Subareas for the Work Schedule*.
- b) On the *Change View "Personnel Subarea Grouping for Work Schedules": Overview screen*, check the personnel grouping for your personnel subarea TP## Production dept.. The grouping for daily work schedules for your personnel subarea TP## Production Dept.should be 01.
- c) In *Customizing* choose: *Time Management > Work Schedules > Personnel Subarea Groupings > Group Personnel Subareas for the Daily Work Schedule*.
- d) On the *Change View "Assignment of PS Grouping for Work Schedules to Daily WS"* screen, check the grouping for daily work schedules for your personnel subarea TP## Production Dept..The daily work schedule grouping assigned to your personnel subarea TP## Production Dept. should be 01. Check to make sure that this assignment already exists.
2. Create a break schedule called ##B1 with a one hour fixed unpaid break from 12:00 to 13:00. Use the grouping for daily work schedules 01
- a) In *Customizing*, choose: *Time Management > Work Schedules > Daily Work Schedules > Define Break Schedules*.
- b) In the *Choose Activity* dialog box, double-click *Determine Break Schedules*.
- c) On the *Change View Work Break Schedule: Overview screen*, copy existing one hour fixed break schedule NORM. Choose the *Copy* pushbutton. On the *New Entries: Overview of Added Entries* screen, enter the following values in the respective fields for your two break schedules:
- | Field | Value |
|-----------------------------------|------------------------------------|
| Grpg (Employee subgroup grouping) | 01 |
| Break (Break schedule) | ##B1 |
| Number | 01 (for your first break schedule) |
| Unpaid | 1.00 |
| Time | 12:00 to 13:00 |
- d) Save your entries.
3. Define the daily work schedules ##D8 ## 8 Hours , ##D9 ## 9 Hours , and ##OF ## Off by using the daily work schedules H8, H9, and OFF, respectively. Note: These DWS are assigned to PSA Grouping 10 – be sure to assign the grouping for daily work schedules 01. Assign the break schedule ##B1 you previously created to the daily work schedules. The details of the daily work schedules are as follows:
- For the daily work schedule ##D8 ## 8 Hours , work starts at 08:00, with a planned working time of 8 hours.

- For the daily work schedule ##D9 ## 9 Hours , work starts at 8:00, with a planned working time of 9 hours (industry hours).
 - For the daily work schedule ##OF ## Off , select no planned hours and planned working time of 0 hours.
- a) In *Customizing*, choose: *Time Management > Work Schedules > Daily Work Schedules > Define Daily Work Schedules*.
- b) On the *Change View "Daily Work Schedule": Overview screen*, select the H8 entry in *PSA Grouping 10* and choose the *Copy As* pushbutton.
- c) On the *Change View "Daily Work Schedule": Details of Selected Set screen*, enter the following values in the respective fields:

| Field | Value |
|--|--|
| DWS grouping | 01 |
| Daily work schedule | ##D8 (in the first field), leave the second field blank, and enter ## 8 Hours (in the third field) |
| Planned working hours (in the Planned working hours screen area) | 8.00 |
| Planned working time (in the Working time screen area) | 08:00 |
| Work break schedule | ##B1 |

- d) Save your entries.
- e) On the *Change View "Daily Work Schedule": Overview screen*, select the H9 entry in *PSA Grouping 10* and choose the *Copy As* pushbutton.
- f) On the *Change View "Daily Work Schedule": Details of Selected Set screen*, enter the values from the table in the respective fields:

| Field | Value |
|--|--|
| DWS grouping | 01 |
| Daily work schedule | ##D9 (in the first field), leave the second field blank, and enter ## 9 Hours (in the third field) |
| Planned working hours (in the Planned working hours screen area) | 8.00 |
| Planned working time (in the Working time screen area) | 8.00 |
| Work break schedule | ##B1 |

- g) Save your entries.
- h) On the *Change View "Daily Work Schedule": Overview* screen, select the OFF entry in PSA Grouping 10 and choose the Copy As pushbutton.
- i) On the *Change View "Daily Work Schedule": Details of Selected Set* screen, enter the values from the table in the respective fields:

| Field | Value |
|--|--|
| DWS grouping | 01 |
| Daily work schedule | ##OF (in the first field), leave the second field blank, and enter ## Off (in the third field) |
| Planned working hours (in the Planned working hours screen area) | 0 |
| No planned working hours | Selected |
| Work break schedule | None |

- j) Save your entries.
- 4. Create a period work schedule ##98. Group the daily work schedules ##D8 , ##D9 and ##OF into one period work schedule called ##98. . The work pattern repeats itself every two weeks. You can copy two weeks of an existing period work schedule. Choose the grouping for daily work schedules 01. Week 2 should indicate the last 3 days of the week as ##OF.
- a) In Customizing, choose: *Time Management > Work Schedules > Period Work Schedules > Define Period Work Schedules*.
- b) On the *Change View Period Work Schedule: Overview* screen, in PSA Grouping 10, select both weeks of PWS 9X80 and choose the Copy As pushbutton.
- c) On the *Change View "Period Work Schedule": Overview of Selected Set* screen, enter the values from the table in the respective fields in the three rows:

| Field | Value |
|----------------------------|---|
| Grpg | 01 |
| PWS (Period work schedule) | ##98 |
| Week | 001 for your first week, 002 for your second week |
| 01 to 04 (for Week 1) | ##D9 |
| Day 05 (for Week 1) | ##D8 |
| 06 and 07 (for Week 1) | OFF |
| 01 to 04 (for Week 2) | ##D9 |

| Field | Value |
|-----------------------|-------|
| 05 to 07 (for Week 2) | OFF |

- d) Save your entries.
5. Check selection rule for day types. Your employees are required to work on public holidays. Check the selection rule 02. This rule will be referenced later in the work schedule rule. 02. This rule will be referenced later in the work schedule rule.
- a) In *Customizing*, choose: *Time Management > Work Schedules > Day Types > Define Selection Rules*.
- b) On the *Change View "Definition Rules for Day Types"*: Overview screen, verify the selection rule 02. This rule is displayed on the screen as displayed in the graphic.

| | | | | |
|------|--------------------|-----------------------|------------------------|----------------------|
| Rule | With Holiday Class | Weekday b123456789 | Saturday b123456789 | Sunday b123456789 |
| 02 | Gives Day Type | | | |

Figure 4: Selection Rule for Day Types

6. Check the employee subgroup grouping. Make sure that an employee subgroup grouping already exists for your hourly wage earners. Check the public holiday calendar assigned to the personnel subarea TP## Production Dept.
- a) In *Customizing*, choose: *Time Management > Work Schedules -> Work Schedule Rules and Work Schedules > Define Employee Subgroup Groupings*.
- b) In the *Choose Activity* dialog box, double-click *Define Employee Subgroup Grouping*.
- c) In the *Change View "Text for Work Schedule Grouping"*: Overview screen, check which employee subgroup grouping for the work schedule rule already exists for industrial and hourly workers. This should be 1.
- d) Go back to the *Choose Activity* dialog box and double-click *Group Employee Subgroups for Work Schedules*.
- e) In the *Determine Work Area: Entry* dialog box, enter **99** in the *Work Area* field, and choose *Continue*.
- f) On the *Change View "Employee Subgroup Grouping for Work Schedule"*: Overview screen, check whether the above employee subgroup grouping for work schedules is already assigned to your employee subgroup Hourly Wage Earners XI (xi). Go back to the *Customizing* menu.
- g) In *Customizing*, choose: *Time Management > Work Schedules > Work Schedule Rules and Work Schedules > Define Groupings for the Public Holiday Calendar*.
- h) In the *Change View "Assign Personnel Subarea to Public Holiday Calendar"*: Overview screen, check whether a public holiday calendar is already assigned to your personnel subarea TP##. The public holiday calendar assigned to your personnel subarea TP## should be 99.

7. Define two work schedule rules ##9x80_1 and ##9x80_2 . From ESG Grouping 1, Holiday Calendar US and PSA Grouping 10, copy the work schedule rules 9X80 and 9X80_2 . For your copy, use the employee subgroup grouping Industrial Workers and the public holiday calendar assigned to your personnel subarea TP##, as well as the personnel subarea grouping for work schedules. Use the rule for day types 02. Use your period work schedule ##98.

- a) In *Customizing*, choose: *Time Management > Work Schedules > Work Schedule Rules and Work Schedules > Set Work Schedule Rules and Work Schedules*.
- b) On the *Change View "Work Schedule Rule"*: Overview screen, select an existing entry for hourly-wage earners and choose the *Copy As* pushbutton.
- c) On the *Change View "Work Schedule Rule"*: *Details of Selected Set* screen, enter the values from the table in the respective fields. Note: If the work schedule you have copied has any entry in the *Alternative WS rule* field in the *Reduced working hours* area, delete this entry before saving your work schedule rule.

| Field | Value |
|----------------------|----------------------|
| ES grouping | 1 |
| Holiday Calendar ID | 99 |
| PS grouping | 01 |
| Work schedule rule | ##9x80_1 |
| Text | ## 9 Days/80 Hours 1 |
| Rule for day types | 02 |
| Period work schedule | ##98 |
| Ref. date for PWS | 01/01/1990 |
| Start point in PWS | 001 |

- d) Save your entries.
 - e) Repeat the same steps to create work schedule rule ##9x80_2 and change the starting point in the PWS day 008. In the text change _1 to _2.
8. Generate work schedules ##9x80_1 and ##9x80_2 (# 9 Days / 80 Hours 1 and # 9 Days / 80 Hours 2) for a period of three years.
- a) In *Customizing*, choose: *Time Management > Work Schedules > Work Schedule Rules and Work Schedules > Generate Work Schedules Manually*.
 - b) On the *Create Work Schedule* screen, enter the values from the table in the respective fields. Note: The instructor may provide a different generation period.

| Field | Value |
|----------------------------|-------|
| Employee subgroup grouping | 1 |
| Holiday calendar | 99 |

| Field | Value |
|------------------------------|-------------------------------|
| Personnel subarea grouping | 01 |
| Work schedule rule | ##9x80_1 |
| Calendar month from (MMYYYY) | December of previous year |
| to (MMYYYY) | January (of current year + 3) |

- c) Choose *Create all*. Repeat these steps for ##9x80_2 ##9x80_2.
9. Assign work schedule rule ##9x80_1 to your hourly-wage earner in the Planned Working Time infotype, starting the first of this month.
- On the *Create Work Schedule* screen, choose *System > Create Session*.
 - On the SAP Easy Access screen, choose *Human Resources > Time Management > Administration > Time Data > Maintain*.
 - On the *Maintain Time Data* screen, enter the values from the table in the respective fields:

| Field | Value |
|---------------|------------------------------|
| Personnel no. | 306991## (industrial worker) |
| Infotype | 0007 (planned working time) |

- d) Choose the *Create* pushbutton.
- e) On the *Create Planned Working Time* screen, enter the following values in the respective fields:

| Field | Value |
|--------------------|----------------------------|
| Start | first of the current month |
| Work schedule rule | ##9x80_1 |

- f) Choose *Enter* to confirm your entries.
- g) Save your entries.

Case Study: Part 2: Hire a New Employee

Business Example

In your role as Time Administrator, you have created a new work schedule rule. You want to hire an employee to the test assignment of your new 9x80 work schedule rule. Hire a new employee as of 01/01/YYYY. Use the Time Recording Mini Master Personnel Action. Assign personnel number 306995##. Assign your new Work Schedule rule on IT0007.

| Infotype | Field | Value |
|---------------|---|----------------------------|
| Hiring Action | Personnel Number | 306995## |
| Hiring Action | From | 01/01/YYYY |
| 0000 | Personnel Area | CABB |
| 0000 | EE Group | 1 |
| 0000 | EE Subgroup | XI (xi) |
| 0002 | Last name | Your choice |
| 0002 | First name | Your choice |
| 0002 | Date of Birth | Your choice |
| 0001 | Personnel Subarea | 0001 |
| 0001 | Payroll Area (confirm and save) | XO (monthly) |
| 0001 | Position (no position; enter at dialog box) | Continue |
| 0007 | WS Rule | ##9X80_1 |
| 0007 | TM Status | 9 |
| 0050 | -- | if presented, chose cancel |

1. Run hiring action WNATE Time Rec (Mini-Master) for employee 306995##.

- a) Run a hiring action: From the SAP Easy Access screen, enter transaction code PA40, in the *Command* field and press *Enter*. Alternatively, choose: *Human Resources > Personnel Management > Administration > HR Master Data -> Personnel Actions*.
- b) On the *Personnel Actions* screen, enter personnel number **306995##**. Enter the first of the current year **01/01/YYYY**, select the action *Time Rec (Mini-Master)* and choose *Execute*.
- c) Use the data provided in the table to complete each infotype in the action. Any required data not explicitly listed in the table can be your choice.
- d) Save each infotype to proceed to the next infotype.

| Infotype | Field | Value |
|---------------|------------------|-------------|
| Hiring Action | Personnel Number | 306995## |
| Hiring Action | From | 01/01/YYYY |
| 0000 | Personnel Area | CABB |
| 0000 | EE Group | 1 |
| 0000 | EE Subgroup | XI (xi) |
| 0002 | Last Name | Your Choice |
| 0002 | First Name | Your Choice |

| Infotype | Field | Value |
|----------|---|-----------------------------|
| 0002 | Date of Birth | Your Choice |
| 0001 | Personnel Subarea | 0001 |
| 0001 | Payroll Area (confirm and save) | X0 (monthly) |
| 0001 | Position (no position: enter at dialog box) | Continue |
| 0007 | WS Rule | ##9X80_1 |
| 0007 | TM Status | 9 |
| 0050 | -- | If presented, choose Cancel |

Case Study: Part 3: Set Up an Absence Type

Business Example

As the Time Administrator, you are responsible for the setup of absence types. You have received a request to create a new absence type and will copy and modify one of the samples provided in the standard SAP system. Create the absence type ##LE , call it Leave Group ##, and define the following checks. The maximum duration should be 999 days. The time constraint class should be set up to allow this type of leave to be delimited automatically if it overlaps with a newly created absence record for sick leave.

If the start and end of the absence are designated as a non-working period, you want the administrator to receive a warning message.

If the entire period is a non-working period, you want the administrator to receive an error message.



Note:

If the system prompts you for a country grouping, choose Other countries.

1. Check the appropriate groupings.
 - a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Group Personnel Subareas for Attendances and Absences*.
 - b) On the *Change View Personnel Subarea Grouping for Absence/ Attendance Types* screen, check to ensure that the personnel subarea grouping for your personnel subarea TP## is 01.
2. Create the absence type ##LE and call it Leave Group ## . To do so, copy the absence type 0100 (Leave).
 - a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Define Absence Types*.
 - b) Select the absence type 0100 (Leave) for the personnel subarea grouping 01 and choose the *Copy As* pushbutton.
 - c) In the A/ A type field, enter **##LE** and in the text field enter **Leave group ##**.
 - d) Remain on this screen.

3. Define the checks that the system has to perform when an absence is entered. If the start and end of the absence are designated as a non-working period, the administrator must receive a warning message. If the entire period is a non-working period, the administrator must receive an error message. You do not want any restrictions for the maximum duration for the absence type.
 - a) In the *First day is day off* and *Last day is day off* fields, enter **w** for warning.
 - b) In the *Non-working period* field, enter **E** for error.
 - c) In the *Maximum duration* field, enter **999**. Leave the *Unit* field blank for calendar days.
 - d) Press *Enter* and *Save* your entries.

Case Study: Part 4: Define Counting Rules

Business Example

Employees call in sick, go on vacation, participate in training courses, or go on business trips. As the Time Administrator, you must record attendances and absences correctly for your company. You need to create counting rules to determine the payroll days and hours for attendances and absences. For this reason, you need to know how to define counting rules. Define a counting rule to determine the payroll days and hours for absences.

Create a new Counting Rule 1## and assign it to absence type ##LE. Quota should be deducted on working days even if they fall on a holiday. Incorporate the Daily Work Schedule Class and Counting Class for Period Work Schedule.

Use Quota Groupings:

- Employee Subgroup Grouping 2
- Personnel Subarea Grouping: 01

1. Define a counting class for the period work schedule that you created. You must make an entry for your period work schedule in the applicable Customizing view, because the counting class of a period work schedule is queried in the counting rules.
 - a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Absence Counting > Define Counting Classes for the Period Work Schedule*.
 - b) On the *Change View "Period Work Schedule Valuation"*: Overview screen, select any entry.
 - c) Choose the *Copy As* pushbutton.
 - d) On the *Change View Period Work Schedule Valuation: Overview of Selected Set* screen, enter **##98** (## is your group number) in the *Period WS (Period work schedule)* field and enter **9** as the *valuation class*.



Note:

Make sure that you copy the correct personnel subarea grouping (01).

- e) In the *Cntg class (counting class)* field, enter counting class **9**.
- f) Save your entries.

2. Define a counting rule with to be used for your absence type ##LE . Your personnel subarea TP## must be assigned to the personnel subarea grouping for time quotas. The applicable employee subgroups must be assigned to the employee subgroup grouping for time quotas 2. For these groupings, create counting rule 1## and name it Counting rule group ##.
 - a) On the SAP Easy Access screen, enter SPRO in the Command field and press Enter. Choose the SAP Reference IMG.
 - b) In Customizing choose: *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Absence Counting > Rules for Absence Counting (New) > Group Employee Subgroups for Time Quotas*.
 - c) In the *Determine Work Area: Entry* dialog box, choose Continue.
 - d) On the *Change View "Employee Subgroup Grouping for Time Quotas"*: Overview screen, check the relevant employee subgroup (XI (xi)) to ensure that your employee is assigned to the *employee subgroup grouping for time quotas 2*.
 - e) Go back to the initial *Customizing* screen and choose *Group Personnel Subareas for Time Quotas*.
 - f) On the *Change View "Personnel Subarea Grouping for Time Quota Type"*: Overview screen, check whether your personnel subarea TP## is assigned to the grouping 01.
 - g) To check the rounding rules that you want to assign to your counting rule, return to the initial *Customizing* screen and choose *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Absence Counting > Rules for Absence Counting (New) > Define Rules for Rounding Counted Absences*. Rule 01 corresponds to the requirements of this exercise. The values determined are rounded to the next whole number.
3. Define a counting rule 1## with subrule 001. Apply the following specifications to subrule 001:
 - The absence type is to be counted on all seven days of the week.
 - Since your new work schedule rule will require assigned employees to work if they are scheduled even on holidays, select every holiday class.
 - The absence is counted only if the day is a work day according to the work schedule.
 - For sequence 001, counting occurs on for period work schedules assigned to valuation class 9 and daily work schedule classes 8 and 9 (these should be the DWS classes assigned to your 8 and 9 hour days respectively).
 - The rule applies only to days with planned hours greater than zero and to days that have full day and partial day absences.
 - Hours and days are to be counted as whole amounts (100%) and are rounded to the next whole number. Choose and assign a suitable rounding rule.
 - Absence hours and days are to be multiplied first by the quota multiplier before the values determined for payroll days and hours are rounded.
 - Do not enter any quota deduction rules in the deduction rule section yet.

- a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Absence Counting > Rules for Absence Counting (New) > Define Counting Rules*.
- b) Choose the *New Entries* pushbutton.
- c) Enter the values provided in the table values:

| Field | Value |
|--|----------------------------|
| ESG Time quota types (Employee subgroup grouping) | 2 |
| PS Grpg Tm Quota Type (Personnel subarea grouping) | 01 |
| Counting rule | 1## Counting rule group ## |
| Sequential no. | 001 |

- d) In the *Conditions for current day* screen area, select the following options or values:

| Section | Option/Value |
|---------------|----------------------------|
| Weekday | Select all seven days |
| Holiday class | Select all holiday classes |
| Day Type | Work acc. to work schedule |

- e) In the *Conditions for work schedule* screen area, select the options or values provided in the table:

| Section | Option/Value |
|---|---------------------------------|
| Counting class for period work schedule | Select only 9 |
| Daily work schedule class | Select both 8 and 9 |
| Condition for planned hours | Planned hours > 0 |
| Condition for absence/ attendance | Choose both <1 day and Full-day |

- f) In both *Counting* screen section areas, select the options or values provided in the table:

| Section | Option/Value |
|------------------|--------------|
| Quota multiplier | 100 |
| Rounding rule | 01 |

- g) Retain the default option *Multiply first* for both *Counting* screen sections.
- h) Save your entries.
4. To ensure that the absences of employees are recorded correctly, you need to apply counting rules to absence types. For this reason, you need to know how to assign a counting rule to an absence type. Assign the counting rule 1## (### = your group number) to the absence type ##LE. Check if quota deduction for the absence type ##LE is already activated. Assign a counting rule to an absence type.
- a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Absences > Absence Catalog > Absence Counting > Assign Counting Rules to Absence Types*.
 - b) On the *Change View Absence: Counting and Quota Deduction: Overview* screen, choose the absence type ##LE and choose *Goto > Details* from the menu bar.
 - c) In the *Counting rule* field for your absence type LE# # enter the counting rule **1##**.
 - d) Make sure the *Quota Deduction* field is activated.
 - e) Save your entries.

Case Study: Part 5 Set Up Quota Types

Business Example

As part of your job, you are responsible for the maintenance of quota types. You need to configure Annual Leave (40+##) with increasing entitlements based on length of service and calculated in hours. You also need to configure Sick Leave (70+##) with a fixed value of 80 hours for all employees. Both quotas will be generated in time evaluation.

Accrue entitlements of different quota types for employees.

1. Set up Quota Types. One is for Annual Leave 40+## and the other is Annual Sick Leave 70+##. Both should be deducted in hours.
 - a) In *Customizing*, choose: *Time Management Time Data Recording and Administration > Managing Time Accounts Using Attendance/Absence Quotas > Time Quota types > Define Absence Quota types*.
 - b) Copy the first entry and adjust the fields indicated in the table:

| Field | Value |
|------------------------------|-----------------|
| ESG Time Quota types | 2 |
| PSA Grouping Time Quota Type | 01 |
| Absence Quota type | 40+## |
| Quota Text | Annual Leave ## |
| Time/measurement unit | Hours |
| Time Constraint Class | 01 |

- c) Press *Enter* and *Save*.
2. Designate that your quota will be generated in time evaluation.

- a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Managing Time Accounts Using Attendance/Absence Quotas > Calculating Absence Entitlements > Automatic Accrual of Absence Quotas > Permit Generation of Quotas in Time Evaluation*.

- b) Select the *Position* pushbutton and enter the values from the table.:

| Field | Value |
|------------------------------|-------|
| ESG Time Quota types | 2 |
| PSA Grouping Time Quota Type | 01 |
| Absence Quota type | 40+## |

- c) Choose *Enter* to position on your quota and then select the *Increase* radio button and save.

Case Study: Part 6 Set Up Quota Entitlements/Selection Rules

Business Example

In your company, quotas have specific entitlements. As the Time Administrator, you need to create a base entitlement rule for Annual Leave 001. This rule should have several sequences. This will be used with the quota type 40+## Leave group ##.

1. Set up Quota Entitlements/Selection Rules for 40+##. Once you have created both quota types, set up appropriate base entitlement rules, validity/deduction intervals, and generation rules for 40+## Annual Leave. Include these in a Quota Selection Rule for your QUOMO grouping 30+##.

Quota Groupings:

- Employee Subgroup Grouping Time Quota: 2
- Personnel Subarea Grouping Time Quota: 01
- Personnel Subarea Grouping Time Recording: 01
- Quota Type Selection Group: 30+##

Hint: Verify the feature QUOMO is currently set up to provide this 30+## return value for all 3 of your employees in TP##.

Quota Types:

- 40+## Annual Leave: Attempt to create base entitlement rules similar to those used by your own company. The total entitlement of annual leave should be reduced for any period of inactivity during the base entitlement period.
- 70+## Sick Leave (80 hours): Employees are entitled to the full entitlement even if they were inactive up to 25% of the base entitlement period.

2. Define base entitlements.

- a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Managing Time Accounts Using Attendance/Absence Quotas > Calculating Absence Entitlements > Rules for Generating Absence Quotas > Set Base Entitlements*.

- b) In the *Choose Activity* dialog box, choose *Base Entitlement for Absence Quota Generation*.
- c) On the *Change View Base Entitlement for Absence Quota Generation: Overview* screen, choose the *New Entries* pushbutton.
- d) Make the following entries for rule 001.

| Field | Value |
|--|--------------------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| ES grpg for time quotas | 2 |
| PS grpg for time quotas | 01 |
| PS grpg for time recording | 01 |
| Absence quota type | 40+## |
| Rule for base entitlement | 001 |
| Sequence | 010 |
| Seniority | 0-2 years |
| Constant (In the Entitlement screen area) | 80 |
| Calendar year (In the related to period screen area) | Select this radio button |

- e) Press *Enter* and then *Save* your entries and go back to the *Overview* screen.
 - f) Select your new rule and then choose *Copy*. Add additional base entitlements of your choosing for at least 3 other seniority intervals. Use sequence numbers 020, 030, 040, etc. as you repeat the steps above.
Suggested seniority ranges and entitlements: 2-4 years = 120 hours, 4-7 years = 160 hours, and 7-999 years = 200 hours.
3. Define the validity/deduction interval (40+##). Since both quotas will be generated in time evaluation, it is possible to define separate validity intervals for each. However, in the case study we will use the calendar year for both.
- a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration -> Managing Time Accounts Using Attendance/Absence Quotas > Calculating Absence Entitlement > Rules for Generating Absence Quota > Determine Validity and Deduction Periods*.
 - b) On the *Change View Validity/Deduction Interval for Absence Quotas: Overview* page, choose the *New Entries* pushbutton and enter the data from the table.

| Field | Value |
|-----------------------|-------|
| ESG Time quota types | 2 |
| PS Grpg Tm Quota Type | 01 |

| Field | Value |
|--------------------|----------------------------|
| Absence quota type | 40+## |
| Valid From | Calendar year Start |
| Valid To | Calendar year End |
| Deduction from | Start of validity interval |
| Deduction To | End of validity interval |
| Relative position | leave blank |

c) Save your entries.

4. Identify existing reduction and rounding rules for quota entitlements (40+##) that will be assigned to your new quota entitlement.

- In the case of employees who join or leave the company midyear, you want the leave entitlement to be proportionately lower, that is, you want the entitlement to be reduced pro rata. You want to round up or down to full hours when determining total entitlements.
- Use standard reduction rule 03 and standard rounding rule 01. These rules are as follows and will be assigned to your rules in subsequent steps.

| Field | Value |
|----------------|---|
| Reduction Rule | 03 (Reduction rule for inactive hours group ##) |
| Rounding Rule | 01 (Rounding rule to nearest whole number) |

5. Define generation rules for quota selection (40+##). Enter a selection rule with the ID 1## for accruing additional quota 40+##. Name this selection rule Annual leave 40+##. The following specifications are valid for this selection rule:

- The rule applies to all employees in your personnel subarea, but entitlements differ based on their length of service with the company.
- The accrual period is one calendar year.
- You must assign the rule for base entitlement that you created earlier.
- You must set up a pro rata reduction of quota entitlement for employees leaving or joining the company midyear.
- The total entitlement determined is to be rounded so that only full hours are used.

a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Managing Time Accounts Using Attendance/ Absence Quotas > Calculating Absence Entitlements > Rules for Generating Absence Quotas > Define Generation Rules for Quota Type Selection*.

b) On the *Change View Selection Rules: Overview* screen, choose the *New Entries* pushbutton and enter the data from the table.

| Field | Value |
|----------------------------|----------------------|
| Start | 01/01/1990 |
| End | 12/31/9999 |
| ESG for time quotas | 2 |
| PSG for time quotas | 01 |
| PSG for time rec | 01 |
| Quota Type sel grp (QUOMO) | 30+## |
| Selection Rule | 1## (Annual Leave) |
| Absence quota type | 40+## (Annual Leave) |

- c) On the *Base entitl.* tab page, enter 001 in the Rule for Base Entitlement field.



Note:

This rule contains all seniority sequences you defined earlier.

- d) On the *Applicability* tab page, adopt the default settings.
- e) On the *Accrual* tab page, select Calendar year.
- f) On the *Accrual entitl.* tab page, enter 03 in the *Reduction Rule* field and enter 01 in the *Rounding Rule* field.
- g) On the *Transfer Time* tab page, choose *Per Pay Period*.
- h) Press *Enter* and Save your entries.

Case Study: Part 7 Create and Assign Deduction Rules

Business Example

Employees in your company have various quota entitlements. An absence should only reduce one quota. It is possible for employees to have the same quota with varying expiration dates. In this case, the deduction to date is the highest priority. As the Time Administrator, you are responsible for the set up of quota entitlements and related deduction rules. You need to set up and assign deduction rules to ensure quotas are deducted properly.

Create and assign a quota deduction rule.

When your employees take leave using absence type LE, the quota associated with each leave quota type must not be deducted beyond the entitlement.

Set up Quota Entitlements/Selection Rules for 40+##. Once you have created both quota types, set up appropriate base entitlement rules, validity/deduction intervals, and generation rules for 40+## Annual Leave. Include these in a Quota Selection Rule for your QUOMO grouping 30+##.

Quota Groupings:

- Employee Subgroup Grouping Time Quota: 2
- Personnel Subarea Grouping Time Quota: 01

- Personnel Subarea Grouping Time Recording. 01
- Quota Type Selection Group: 30+##

Hint: Verify the feature QUOMO is currently set up to provide this 30+## return value for all 3 of your employees in TP##.

Quota Types:

- 40+## Annual Leave: Attempt to create base entitlement rules similar to those used by your own company. The total entitlement of annual leave should be reduced for any period of inactivity during the base entitlement period.
 - 70+## Sick Leave (80 hours): Employees are entitled to the full entitlement even if they were inactive up to 25% of the base entitlement period.
1. Create a quota deduction rule 1## (where # # = your group number). This rule is used to reduce quota type 40+##. If the employee has quota type 40+## with varying expiration dates then the deduction to dates are the first priority for deduction. Make sure that no deduction from additional quotas is permitted. 1## (where # # = your group number). This rule is used to reduce quota type 40+##. If the employee has quota type 40+## with varying expiration dates then the deduction to dates are the first priority for deduction. Make sure that no deduction from additional quotas is permitted.
 - a) In Customizing, choose: *Time Management > Time Data Recording and Administration > Managing Time Accounts Using Attendance/ Absence Quotas > Quota Deduction Using Attendances/ Absences > Define Deduction Rules for Absence and Attendance Quotas.*
 - b) In the Choose Activity dialog box, double-click *Define Deduction Rules for Absence Quotas*.
 - c) On the *Change View "Deduction Rules for Absence Quotas"*: Overview screen, choose the *New Entries* pushbutton.pushbutton.
 - d) On the *New Entries: Details of Added Entries* screen, enter the following values in the respective fields:

| Field | Value |
|---|----------------------------------|
| ESG Time quota types | 2 |
| PS Grpg Tm Quota Typ | 01 |
| Start | 01/ 01/ 1990 |
| End | 12/31/9999 |
| Deduction rule | 1## Deduction Rule Group ## |
| Unit of relevant absence quota types | Hours (defaults from quota type) |
| Absence quota type (in the first row) | 70+## |
| Absence quota type (in the second row) | 40+## |
| Quota type sequence for further deduction | No further deduction |
| Quota types (in the Deduction Priority section) | Priority 2 |

| Field | Value |
|---|------------|
| Deduction to in the Deduction Priority section) | Priority 1 |

Retain the default value *Ascending* for the sequence.

- e) Save your entries.
2. Assign your quota deduction rule and then activate and check the quota deduction for absence type ##LE. (## = your group number) ##LE. (## = your group number). Assign your quota deduction rule to your counting rule. Where do you make this assignment? Make sure that all above conditions are met when you make the assignment.
- a) In *Customizing*, choose: *Time Management > Time Data Recording and Administration > Managing Time Accounts Using Attendance/ Absence Quotas > Quota Deduction Using Attendances/ Absences > Assign Deduction Rules to Counting Rules*.
 - b) On the *Change View Counting Rule: Overview* screen, choose the counting rule 1## and then choose *Details*.
 - c) On the *Change View Counting Rule: Details* screen, scroll to the end of the counting rule.
 - d) In the *Deduction rule* section under *Absence quotas*, enter the quota deduction rule 1## that you have just created. Specify the quota deduction rule only in the *Within entitlement* field. This ensures that the quotas are not deducted beyond the available entitlement.
 - e) Do this for both sequences of your counting rule.
 - f) Save your entries.
3. Activate and check the quota deduction for ##LE.
- a) To activate and check the quota deduction for the applicable absence type ##LE, in *Customizing*, choose: *Time Management > Time Data Recording and Administration - > Absences > Absence Catalog > Absence Counting > Assign Counting Rules to Absence*.
 - b) Choose the absence type ##LE (Leave Group ##), and choose the *Details* pushbutton.
 - c) On the *Change View Absence Counting and Quota Deduction: Details* screen, check whether your counting rule 1## is assigned to this absence type and confirm the *quota deduction* is selected (activated).

Case Study: Part 8 RPTQUOTA_CHECK

Business Example

You have completed the setup of your new work schedule rule. To ensure it is functioning properly, you want to hire an employee to test assignment of your new 9x80 work schedule rule. You will use RPTQUOTA_CHECK to check generation rules for personnel number 306995##.

1. Use RPTQUOTA_CHECK to check generation rules.
- a) To start the report, from the main menu bar, choose: *System > Services > Reporting* (or call transaction code SE38).

- b) On the *ABAP: Program Execution* screen, enter the following data: *Program: RPTQUOTA_CHECK*.
- c) Choose the *Execute* pushbutton.
- d) On the *Overview of Customizing Settings for Quota Generation* screen, choose *personnel options* and enter **306995##** in the *Personnel Number* field.
- e) Choose the *Execute* pushbutton.
- f) Check the settings in the report output. Choose the *Enter List* pushbutton to display any errors.
- g) If there are errors, correct them in the appropriate *Customizing* step indicated in the report. If you are unclear as to the error message, ask your instructor.

**Note:**

If you would like to configure another quota, you can follow these same steps to create Quota Type 70+##. However for this quota you will only have one sequence in your base entitlement rule. All employees are entitled to a constant 80 hours per year. A proportionate deduction rule should be used, but no rounding is applied. After you set up this quota, use RPTQUOTA_CHECK to test your configuration.

Case Study: Part 9 Business Example: Run Time Evaluation to Create Quota Type 40+##

1. Run Time Evaluation to create quota type 40+##.
 - a) Use transaction code PT60 to run Time Evaluation. Alternatively, from the SAP Easy Access screen, choose: *Human Resources > Time Management > Administration > Time Evaluation > Time Evaluation*.
 - b) Enter the following data on the *HR TIME: Time Evaluation* screen. Note: No other entries are required.

| Field | Value |
|-------------------|------------|
| Personnel Number | 306995## |
| Evaluation Schema | TM04 |
| Evaluation Up To | 01/31/YYYY |
| Display Log | Select |

- c) Choose *Execute*.

Case Study: Part 10 Test Your Configuration**Business Example**

You have completed the configuration to time data and now need to test your configuration.

1. Test your configuration.

- a) Use transaction code PA30 or menu path *Human Resources -> Personnel Management-> Administration -> HR Master Data -> Maintain*
- b) Enter personnel number **306995##, 2006** in the infotype field and Sty **40+##**.
- c) Select the *All* radio button, and then choose the *Overview* icon.
- d) Verify your employee has received a prorated amount of their annual leave entitlement. They should have received 1/12 of the annual entitlement as they are paid monthly.
- e) If you so desire, you can repeat the necessary steps and finish your set up for your quota type **70+##**.